



Everything Investors Need to Know About the New Tax Laws in 2020

PRESENTED BY TOBY MATHIS, Esq.

 **ANDERSON**
LEGAL, BUSINESS & TAX ADVISORS

Today's Presentation

Agenda

- The SECURE Act was signed into law on December 2019 - what it means to investors**
- What are the Most Beneficial Tax Laws for Real Estate Investors**
- What you can still do now to save on your 2019 taxes**

ABOUT ANDERSON BUSINESS ADVISORS

We are a multi-state legal and tax planning firm engaged in working with real estate investors for over 20 years. Unlike many professionals in this space that focus solely on either tax planning or asset protection for real estate investors, at Anderson, we combine tax planning, asset protection, estate and business planning when working with real estate investors to help them reach their goals much quicker

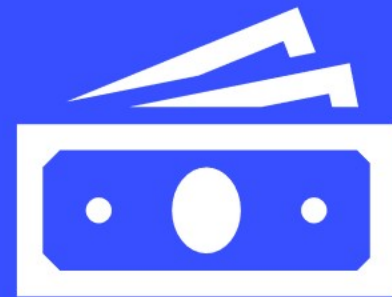


Real Estate

Major Issues to Address for Investors



Lawsuits



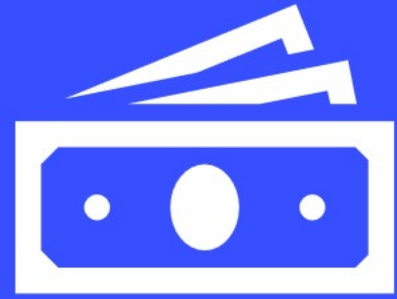
Taxes



Business Planning

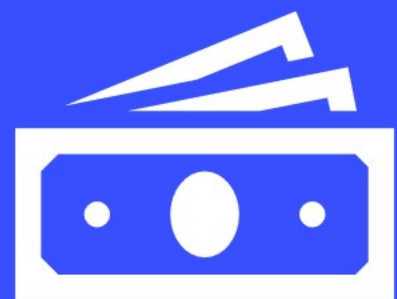


Create a Legacy



Taxes

- **The SECURE Act**
 - **IRA Age Limits**
 - **RMD 72**
 - **2020 401k Plan**
 - **529 Plan Distributions**
 - **No More Stretch**
 - **Birth/Adoption Withdrawal**
 - **Taxable Fellowship Payments/Stipends**



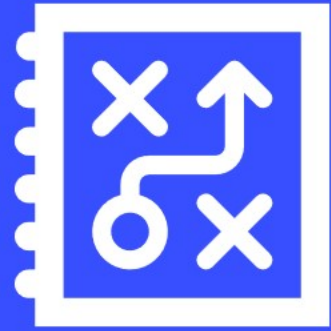
The Most Beneficial Laws

- **Using an Accountable Plan**
- **Depreciation**
 - **Accelerated Depreciation**
 - **Real Estate Professional Status**
 - **Grouping**
- **199A – Rev. Proc 2019-38**
- **1031 Exchange Rules**
- **Qualified Opportunity Zones**



Lawsuits

- **What is the worse thing that can happen?**
- **Inside versus Outside Liability**
- **What are Entities?**
 - **Corporations**
 - **Limited Liability Companies**
 - **Land Trusts?**



Business Planning

- **What Well-intentioned Accountants Do**
- **Working with Lenders**
- **Working with HML**
- **Working with Angels**
- **Portfolio Loans vs. Traditional?**



Create a Legacy

- **Two Choices**
- **Addressing the Obvious**
- **The 200 Year Plan**





ONE SIZE Fits All!



Next Steps



\$= SIGN UP & SAVE TODAY!

TAX TUESDAYS

LIVE Streaming Every Other
Tuesday at 3:00pm
Pacific/6:00pm Eastern

AndersonAdvisors.com/tax-tuesdays/

Anderson Business Advisors Podcast

By AndersonAdvisors.com

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Customer Ratings

★★★★★ 11 Ratings

Description

Real Estate Investors, Stock Traders, and Business Owners guide to preserve their wealth, protect their assets, and prosper in the future. Anderson Business Advisors' Attorneys and Professional Advisors share tax reduction strategies and asset protection techniques to protect and build your wealth.

	Name	Description		Released	Price	
1	Business Deductions with...	Did you know that yo...	i	1/16/2019	Free	View in iTunes ▶
2	Tax Tuesday with Toby M...	Toby Mathis and Jeff ...	i	1/2/2019	Free	View in iTunes ▶
3	Residential Assisted Livin...	Have you considered i...	i	12/21/2018	Free	View in iTunes ▶
4	Tax Tuesday with Toby M...	Toby Mathis and Jeff ...	i	12/21/2018	Free	View in iTunes ▶
5	How to Set Rents with Sc...	How do you determin...	i	12/21/2018	Free	View in iTunes ▶
6	Tax Tuesday with Toby M...	Toby Mathis and Jeff ...	i	12/21/2018	Free	View in iTunes ▶
7	Importance of Insurance f...	Let's face it, even if yo...	i	12/21/2018	Free	View in iTunes ▶
8	Tax Tuesday with Toby M...	Toby Mathis and Jeff ...	i	12/21/2018	Free	View in iTunes ▶
9	Cost Segregation with Bre...	What possibilities are ...	i	11/28/2018	Free	View in iTunes ▶

AndersonAdvisors.com/podcast

**2 TICKETS (Value - \$995) TO
ATTEND OUR 3 DAY
“SECRETS OF REAL ESTATE
ASSET PROTECTION AND
INCOME TAX REDUCTION
WORKSHOP”!**



Here is some of what you will learn:



2 TICKETS TO OUR TAX & ASSET PROTECTION WORKSHOP

February 10-12, 2020

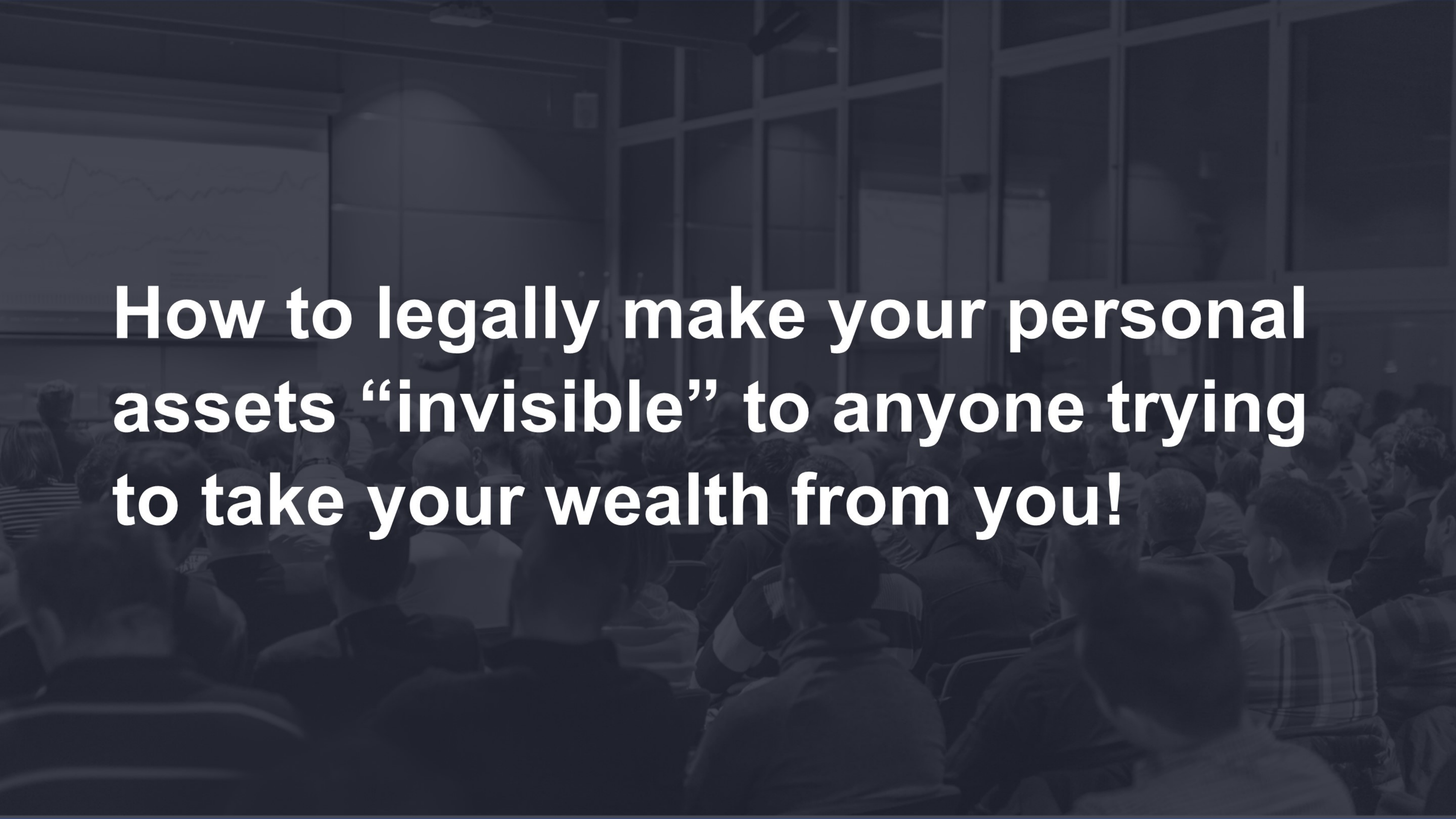
San Francisco Airport Marriott Waterfront
1800 Old Bayshore Highway
Burlingame, CA 94010

January 20-22, 2020

Sheraton San Diego Hotel & Marina
1380 Harbor Island Drive
San Diego, CA 92101



**How our average client legally
deducts more than \$20,000 per
year with our strategies**



How to legally make your personal assets “invisible” to anyone trying to take your wealth from you!



**The 9 biggest legal and tax mistakes
real estate investors make when
buying, selling or leasing properties**



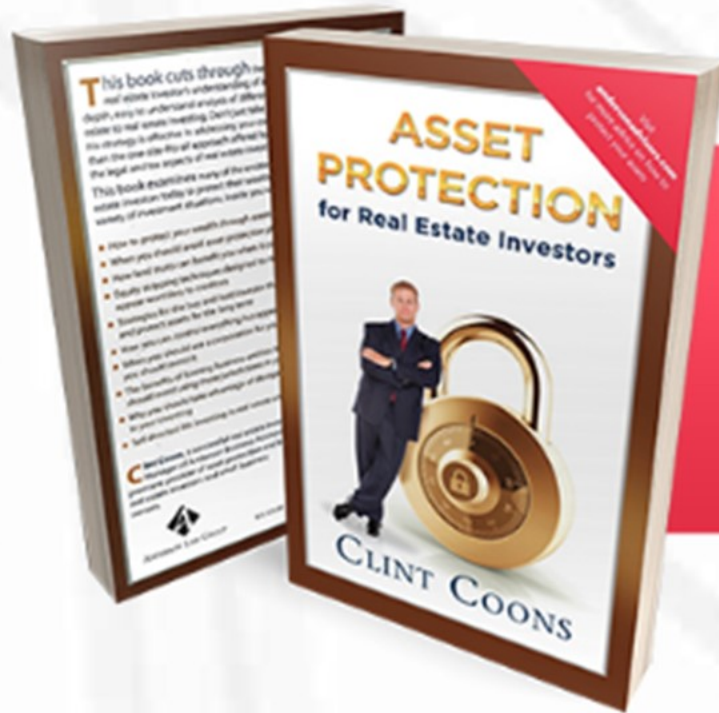
What most attorneys and CPA's get wrong when working with real estate investors



**How to reduce your legal exposure
to virtually zero!**



Leave the workshop with a specific blueprint to save thousands in taxes and bulletproof your personal assets from reckless, frivolous lawsuits!



Visit us at
AndersonAdvisors.com
for more advice to how
to protect your assets.

1 COPY OF TAX & ASSET PROTECTION FOR REAL ESTATE INVESTORS

By Clint Coons, Esq.



NINJA

ASSET PROTECTION STRATEGIES FOR REAL ESTATE INVESTMENTS

- Set-up your real estate entities with maximum privacy
- Nevada vs. Wyoming vs. Delaware – when and how to use these states for different types of real estate protection
- The secret language of land trusts and why they are used widely by real estate investors



POWER

STRUCTURES FOR REAL ESTATE INVESTORS

- Long- & short-term real estate holding strategies for maximizing privacy, protection, and tax savings
- Retirement planning and real estate investing strategies for growing your retirement through real estate investing
- Real estate dynasty planning strategies for passing on your real estate and other investments safely and effectively



ESSENTIAL

REAL ESTATE TAX ARSENAL

- Unbeatable strategies for utilizing your IRA or 401(k) money in real estate
- Unlocking the potential of opportunity zones
- Top 10 real estate tax strategies for more money but less taxable income

**Incredible
Today
ONLY
BONUS!**





STRATEGY SESSION

Create a comprehensive plan for your business, including tax planning and asset protection, PLUS a Wealth Planning Blueprint that outlines the best entity structure for your specific business & financial goals (\$297 value).

MAKE YOUR INVESTMENTS BULLETPROOF



3 PART VIDEO SERIES

On asset protection & tax planning for REIs



2 TICKETS

To Anderson Advisors' *Tax & Asset Protection for Real Estate Investors Workshop* (Regularly \$995)



1 BOOK

1 copy of *Asset Protection for Real Estate Investors* by Clint Coons, Esq.



STRATEGY SESSION

To get your most nagging real estate structuring AND TAX questions and concerns answered by PROFESSIONALS who HAVE SPECIALIZED IN WORKING WITH REAL ESTATE INVESTORS SINCE 1998. - "Uncover mistakes you may be making, and let us help you put an end to them now." (\$297 value)

\$197



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of 10***

**FIND OUR
WORKSHOPS EASY
TO UNDERSTAND**

***10 out
of 10***

**SAVE MONEY WHO
IMPLEMENT OUR
STRATEGIES**

\$197

<https://aba.link/bpgro1>

Toby Mathis email: tmathis@alglaw.com

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3 Part Video Series + Book + Blueprint**