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to learn more about DSTs  
and the power of 1031 exchanges

**JEFF VOGAN, RFC, CEP, CFF®**  
PRESIDENT AND FOUNDER

Jeff P. Vogan is the president and founder of Premiere Retirement Planning & Wealth Management, with offices in Tucson and Mesa, Arizona.

Jeff is a Registered Investment Advisor and regulated fiduciary. He holds the designations of Certified Estate Planner, Registered Financial Consultant, and Certified Financial Fiduciary®. As a Certified Financial Fiduciary®, Jeff holds the highest moral, ethical and fiduciary standards of service when providing advice to potential and existing clients.

Jeff can be seen regularly on TV and heard on his weekly radio show, Premiere Retirement Radio. Many of his articles can be seen in publications such as HuffPost, Kiplinger, and more. His recent book, *Retirement... The Road Ahead*, can be found on Amazon. The Road Ahead, can be found on Amazon.



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**PREMIERE 1031 EXCHANGE**

# I'M A LANDLORD, CAN I EVER TRULY RETIRE? YES, YOU CAN!

## WHAT IS A DST?

Delaware Statutory Trusts (DSTs), allow owners of real estate to sell their rental properties and potentially defer capital gains taxes. DSTs have become an investment vehicle for \*accredited investors who want the benefits of owning real estate without becoming a "landlord", as well as current real estate investors who no longer want the responsibilities of being a landlord.

To be an accredited investor, an individual must have had earned income that exceeded \$200,000 (or \$300,000 together with a spouse) in each of the prior two years and "reasonably expects the same for the current year", according to the SEC. Or, the individual must have a net worth of more than \$1 million, either alone or together with a spouse. With the passage of the Dodd-Frank Act, this now excludes a primary residence as being eligible as part of an investor's net worth (investors who had existing accredited investments but who now fail the net-worth test without their residence being valued were grandfathered).

## WHAT ARE THE MAJOR BENEFITS OF A DST?

**PASSIVE INVESTING:** Relinquish the responsibilities of managing properties and exchange them for freedom without giving up potential profits.

**EXCHANGE TERRIBLE T'S FOR TERRIFIC T'S:** Don't be the landlord who dreads answering the phone for fear that the voice on the other end will present you with a Terrible T (tenants, toilets, trash, turmoil). Instead, enjoy retirement with the Terrific T's (travel, time, tax savings).

**DIVERSIFICATION:** Invest around the country. You choose from investments offering various property types, debt leverage, and location of properties amongst many other attributes.

**INCOME GENERATING:** Collect monthly income on-time to enjoy the golf course or take the dream vacation you've always wanted.

**DISASTER AND EMINENT DOMAIN SOLUTIONS:** If your investment property was lost from fire, hurricane, or eminent domain, you can use DSTs in a Section 1031 exchange and defer the capital gains tax, as well as preserve the step-up in basis opportunity.

**TAX BENEFITS:** Through a DST 1031 exchange, you can defer all capital gain income taxes through purchase of like-kind investment property.

Real Estate investing can be extremely rewarding financially. If you have succeeded in your prior real estate investment activities, you may be faced with a new challenge; how do you sell your property without paying income taxes, continue to receive monthly rental income and appreciation, yet not have to continue taking on the responsibility of property management? A Delaware Statutory Trust may be the solution you are looking for.



## YOUR WAY OUT OF THE "TERRIBLE T'S"

The Terrible T's are what an active manager of real estate, or a landlord is responsible for, including toilets, tenants, trips to Home Depot, termites, and time spent. Many people like being real estate investors, but do not like being a landlord, have the time to spend on it, have the skill sets necessary to do it well, or have the energy.

*"For many who have amassed a small or great fortune in real estate, the hardest part is often divesting assets knowing you have to pay a big chunk of your life's work to Uncle Sam. Fortunately there are ways to help keep more of your hard earned net worth. DST programs are an invaluable tool that allows many of my wealthy clients to retire from the landlord business and continue to defer or possibly eliminate capital gains taxes while making a generous passive income."*

- Jeff Vogan, RFC, CEP, CFF®

## PREMIERE WEALTH ADVISORS 1031 DIFFERENCE

You never pay an upfront commission at Premiere Retirement Planning & Wealth Management because we are a Registered Investment Advisor (RIA), and that means more of your initial investment goes toward your DST ownership percentage.

*"As an RIA, we thoroughly vet DST opportunities and as Fiduciaries, we are morally and legally obligated to always act in your best interest."*

## REASONS FOR USING A DST 1031 EXCHANGE

### 1 Diversify your portfolio with stable Cash Flows

Avoid stock market, interest rate, and geographic risk by passively investing in DSTs.

### 2 Defer taxes when using a DST 1031 Exchange

Keep more of your money by deferring income taxes when it's time to sell investment properties.

### 3 Retain the ability to receive a stepped-up basis.

Being an \*accredited investor is the only requirement you need to own a piece of a DST.

### 4 DSTs can provide a back-up plan when using a 1031 Exchange

1031 Exchanges have strict timing guidelines to identify & close on investment properties. DSTs eliminate these obstacles since you buy shares quickly & easily.

### 5 Protect your spouse from unwanted landlord duties

Leaving a spouse with unwanted stress of being a landlord can be a frightening situation. With DSTs, your spouse will be left with passive investments that are paying monthly cash flows.

### 6 Protect heirs from estate tax and rushed liquidation

1031 Exchanges could eliminate all estate taxes which were once deferred, as well as remove the temptation of liquidating assets too quickly.