PrisCo Financial
Defending your wealth

Cash Flow

- Financial Condition Model
- Social Security Timing
- IRA RMDs
- Roth IRA
- Sale for Note
- Private Annuity
- SCIN
- CRT
- IRA Distribution
- Charitable Life Estate
- Life Insurance Review
- Life Settlements
- Charitable Gift Annuity

Income Tax Reduction

- Charitable Deductions
- Grantor Charitable Lead Annuity Trust
- Charitable Remainder Trust
- Qualified Retirement Plans
- Variable Universal Life/IUL Insurance and Annuities
- Private Foundations
- Oil & Gas Deduction
- PIG/PAL Matching
- 3.8% Surtax Planning
- 1031 and 1035 Exchanges

Investment Management

- Portfolio Analysis & Design
- Asset Allocation
- Mutual Funds / EFTs
- Stocks & Bonds
- Real Estate Investment Trusts (REITs)
- Alternative Investments
- Effective Risk Management
- Ongoing Monitoring
- Performance Reporting
- Inflation Protection
- Education Funding Needs
- Tax Management Strategies

Risk Management

- Life Insurance
- Disability Income Insurance
- Disability Buy-Out
- Long Term Care Insurance
- Policy Audit / Review (PAR)
- Asset Protection
- Will and Trust Design Strategies
- Powers of Attorney
- Health Care Powers
- Key Person Insurance
- Buy / Sell Agreement Funding
- Debt Indemnification
- Corporate Policy Review (CPR)

Wealth Transfer & Estate Tax Reduction

- Gift Tax Exemption Planning
- Sale to IDITs
- QPRT
- Life Insurance Planning
- S Corp Recaps, LPs and LLCs
- Valuation Discounts
- Intra Family Loans
- Dynasty Trusts and Family Banks
- GRATs, ILITs, CLAT
- Private Annuities, SCINs
- IRA Maximization

Business Exit / Succession

- Business Valuation
- Marketability Assessment
- Exit Planning
- Sales to Insiders or Third Parties
- Recapitalizations
- Equalization Issues
- Buy/Sell Agreements
- Life Insurance Funding
- Deferred Compensation Plans
- Stay Bonus/Non-Compete
- Key Employee Agreements
- Growth Strategies
- ESOPs

Liquidity Planning

- Sales to Outsiders
- Life Insurance
- ESOPs
- CRTs
- Equalization Planning
- Income Tax Savings Programs
- Exercise of Stock Options
- Inheritances
- IPO
- Sale of Real Estate

Charitable Planning

- Lifetime Giving
- CLATs
- CRTs
- Charitable Life Estates
- Private Foundations
- Donor Advised Funds
- Operating Foundations
- Non-Financial Advantages
- Zero Out Tax Planning
- IRD Assets to Charity
- Note to Charity
- Family Charity Plan