

Building a Private Reserve

The affluent are able to build their own Private Reserve, apart from their public banking institution. Those seeking refuge from financial volatility, exposure, or taxation, have found the Private Reserve to be effective and targeted for their situation.

The Winfield Group, having more than 25 years of experience, serves the wealthy assisting them in Investment Planning, Tax Planning, and Estate Planning.

The firm approaches each clients situation from a team-centric approach. Winfield advisors lead the team of tax attorneys, estate attorneys, CPAs, and other financial specialists which ensures that each financial strategy that is designed for the client is comprehensive and complementary.

If you are looking for effective strategies to address the challenges that the wealthy face, then contact a Winfield advisor today to begin your financial resolution conversation.

Private Reserve Features

- Tax-Deferred Growth
- Tax-Free Access
- Non-Reportable Income
- Competitive Returns
- Asset Protected
- Compounding Interest
- No-Loss Provision
- Liquidity, Use & Control
- High Contribution Limits

Sample Private Reserve Scenario

Sample Client	Male, Age 45
Annual Allocation	\$100,000
Cash Account Yr 10	\$1,040,000
Cash Account Yr 15	\$1,800,000
Tax-Free Annual Income Starting at Age 66	\$150,000
Cumulative Tax-Free Income	\$3,000,000
Remaining Cash Account at age 85	\$819,000

Contact one of our advisors today to begin building your Private Reserve.



THE WINFIELD GROUP
UNIQUE WEALTH ADVISORS

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