

A Unique Approach to Tax Minimization

Often, clients' advisors are not in communication with each other in developing a comprehensive strategy addressing tax planning. The Winfield Group takes a unique style in embracing a team approach to maximize the value to the client, as all advisors are developing a robust and cohesive plan, incorporating CPAs, tax attorneys, and investment strategies.

Through the implementation of our advanced strategies, most high income earners still have opportunities to significantly reduce their tax bill. In working with The Winfield Group, we will explore both current tax deduction opportunities, as well as long term tax minimization strategies that are best suited for your individual situation.

Confidential
Questionnaire

Feasibility Analysis

Recommendations

Plan Design

Plan
Implementation

On-Going
Administration

Sample Tax Savings

	Taxable Income	Taxes Under Existing Plan	Taxes with TWG Strategy	Taxes Saved	Tax Reduction
Client 1	\$2,500,000	\$1,000,000	\$550,518	\$449,482	44.90%
Client 2	\$1,400,000	\$560,000	\$303,292	\$256,708	45.80%
Client 3	\$330,000	\$132,000	\$31,076	\$100,924	76.30%

Contact one of our advisors
today for a complimentary
initial consultation.



THE WINFIELD GROUP
WEALTH ADVISORS

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