

Subject: Strategy Management Example #1
Date: Wednesday, October 13, 2021 at 9:37:08 AM Eastern Daylight Time
From: Moore, Cody
Attachments: image001.png

Hello John & Jane,

Please see open task below:

- **In-Progress Projects**

- Send most recent statement of Morgan Stanley Holding – John
- Execute Cash-out refinance of 2 houses – John/Jane
- Explore Key/Man & Buy Sell strategy with partners – John
 - John to speak to partners to green light underwriting
- ~~Sell Business to Non-Grantor Trust to reduce capital gains – Wes/John~~
 - ~~Wes and John to look at the numbers Wes sent and discuss next steps.~~
- Wills, Trust, and Ancillary Documents
 - Originals located in safe
 - John to give access to someone other than John and Jane

- **Upcoming Projects**

- Discuss with CPA - John
 - 14-day business rental of home
 - Home office deduction
 - Employing your children
 - New Vehicle Depreciation
 - Housing Allowance
 - Meals & Travel Expenses
 - Conservation Easements
- Year-end tax strategy session - Cody
 - Donor Advised Fund
 - Donate Appreciated Stock
 - Prepay Expenses
 - Roth Conversions of IRA's

- **Future Projects & Discussions**

- Estate & Capital Gain Changes – Wes/John