How do I fund my next venture?

Transitioning from the sale of a business into a new life

BV Group
Private Wealth Management

Client challenge

- Our client, the founder and CEO of his company, wanted to build an investment and family corporate structure to maximize his wealth and minimize income and estate taxes. Selling his business was the first step. But post-sale, he was not sure if he would have enough "conservative" assets to fund his future as well as the necessary "risk" assets to invest in new deals.

Together we found an answer

He was referred to us by his CPA and attorney. This was a collaborative effort that we organized into stages:

- **Presale corporate structuring.** We proposed a GRAT—Grantor Retained Annuity Trust and a private family foundation.
- **Post-sale tax planning.** We proposed a combination of a fixed- and variable-rate securities backed loan to pay for a portion of the capital gains tax bill from the sale.
- **Post-sale estate planning.** Our planning group reviewed his complex estate plan and made recommendations.
- **Post-sale investment structuring.** We proposed tax-free municipal bonds, ETFs and stocks. He was new to significant wealth so we invested slowly over a 12- to 18-month period.
- **Ongoing investment management and monitoring.** Over time, we introduced new opportunities from private equity to real estate. We continue to provide performance, income and risk vs. reward guidance.

The future

- Our coordinated planning helped him save on taxes and realize his charitable dreams and interests through his family foundation. We've simplified his corporate structure and trust documents so that he and his family fully understand their finances. Finally, he has a foundation of conservative investments, insurance coverage, asset protection from creditors and enough to invest in new private companies that look attractive to him.

BV Group

UBS Financial Services Inc.
Private Wealth management
1800 North Military Trail
Suite 300
Boca Raton, FL 33431
561-416-6904

advisors.ubs.com/bvgroup