

National expert unveils improved capital gains tax deferral alternative to now defunct private annuity trust

by Bend Weekly News Sources

As of October 18, 2006 the popular capital gains tax deferral tool the Private Annuity Trust (PAT) has been deemed obsolete by changes in tax regulations. Businesses and sellers of appreciated assets such as real estate used the Private Annuity Trust to defer and reduce capital gains tax liability; however, with the recent tax changes sellers are forced to look to new alternatives. According to national structured sale annuity expert Jack Meligan of Settlement Professionals Inc, "the PAT [private annuity trust] has been replaced and drastically improved upon by the new Structured Sale annuity [a.k.a. Ensured Installment Sale], which provides sellers much more safety, security, benefits, and at no cost." The new Structured Sale offers sellers of appreciated assets such as real estate and businesses a very effective way to defer and reduce capital gains tax and receive a guaranteed stream of income and is fully customizable by the seller. Mr. Meligan states, "The Structured Sale is truly a huge improvement on the PAT and is growing in popularity with more and more sellers looking to retire or exit the business and real estate markets." For those who don't know, both the PAT and Structured Sale are annuity products that are backed by Fortune 100 corporations and allow sellers to achieve tax benefits and collect a stream of income for any time period they choose. However, the Structured Sale when structured correctly offers the seller much more benefits and can be applied in many more situations. Mr. Meligan states, "The Structured Sale is not for everyone; however, it is extremely effective for a large percentage of sellers of real estate and businesses. It's worth learning about because it could be the difference of a seller forking over \$500,000 in capital gains this year versus a whole lot less." Settlement Professionals Inc. has released a new manual that is aimed at helping sellers learn about the Structured Sale (a.k.a. Ensured Installment Sale) and how it compares to other sales strategies. You can get this manual by going to <http://www.structuredsalespro.com> and filling in the form on the right side of the page. Sellers of real estate and businesses can learn about the new Structured Sale at <http://www.structuredsalespro.com> or by calling Settlement Professionals Inc. at 1-800-666-5584.

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