

# UTILIZING THE ROQS® BOX

We work with individuals, advisors, non profits, and businesses to get the most out of appreciated assets by improving client retirements and supporting their favorite charity(s).

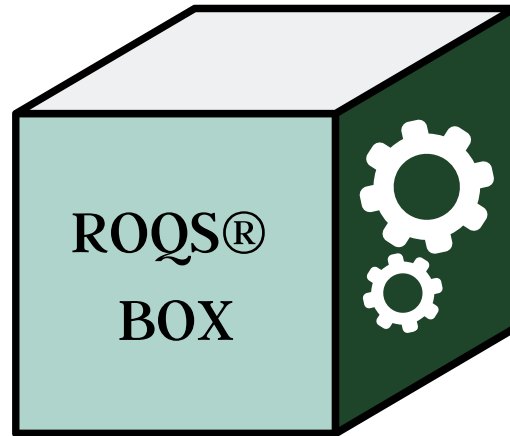
# THE CHARITABLE PAYRAISE®

Better Retirement, Lasting Legacy.

## A NEW APPROACH TO SOLVING OLD PROBLEMS

### Appreciated Assets

Stocks, Real Estate, Business, Art, etc.



Retirement Optimization of Qualified Stock  
Proprietary Method & Patented App



### Charitable Donation

Annual Planned & Final Legacy Gifts



### Improved Cash Flow

20-45% Increase in After Tax Cash Flow



### Tax Deduction

Reduces Income, Capital Gains  
& Estate Taxes



We work with clients and their advisors to enhance tax planning, increase tax free cash flow, & improve their financial well-being while supporting their charitable endeavors. Contact us to learn more.

Follow us on:



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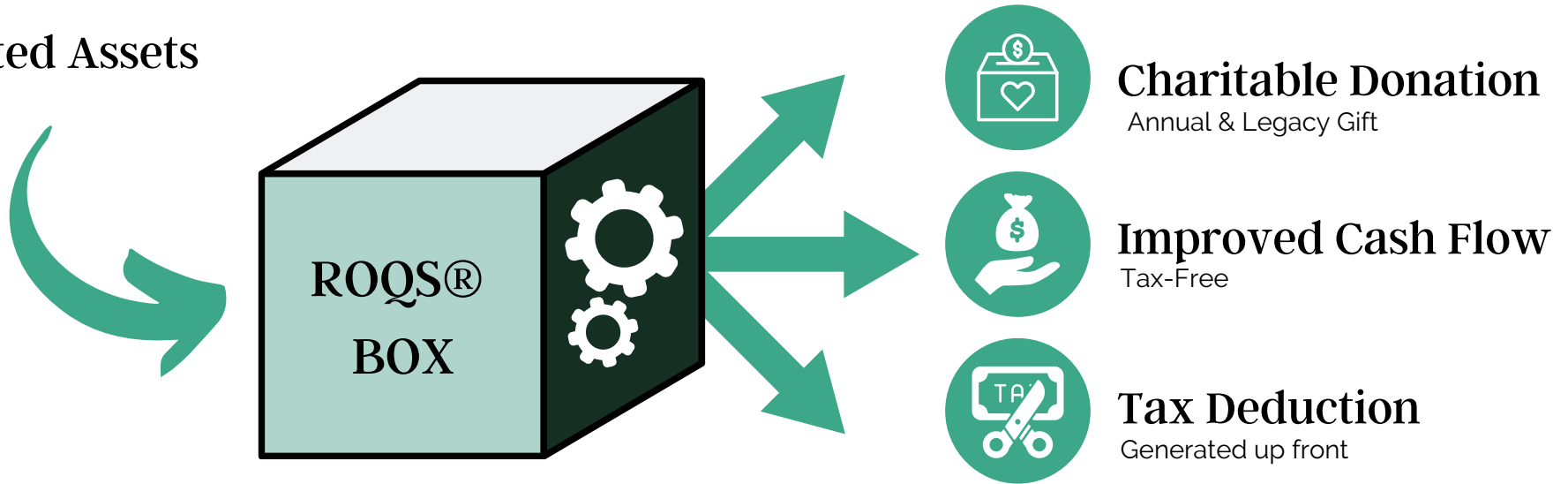
We work with individuals, advisors, charities, and organizations to get the most out of appreciated assets while improving your retirement and helping your favorite charity (or charities!).

## THE CHARITABLE PAYRAISE®

Better Retirement, Lasting Legacy.

### YOUR PATH TO A BETTER RETIREMENT WHILE DOING GOOD

Appreciated Assets



We work with clients and advisors to enhance tax planning, improve the financial well-being of our clients, and support their charitable endeavors. Contact us to learn more.

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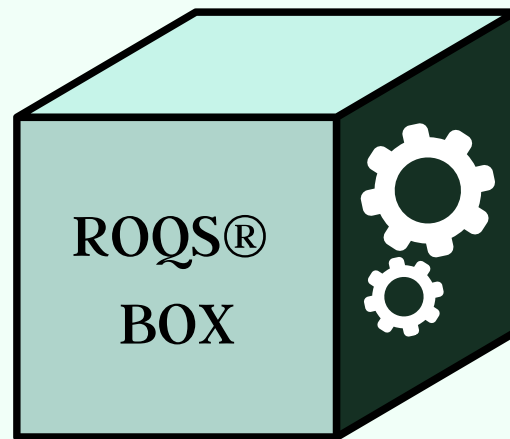
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## YOUR PATH TO A BETTER RETIREMENT WHILE DOING GOOD

Appreciated Assets



**Charitable Donation**  
Annual & Legacy Gift



**Improved Cash Flow**  
Tax-Free



**Tax Deduction**  
Generated up front



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