



# ADVANCED TAX & WEALTH STRATEGIES

Solomon Katsman | WEALTH STRATEGIST

## — ABOUT THE PRACTICE

Solomon Katsman helps business owners and high-income clients **reduce taxes, protect wealth, and plan for liquidity events**. The practice specializes in taxable-income mitigation and capital-gains strategy, while also delivering comprehensive business planning and advanced estate-planning structures.

We partner with CPAs, attorneys, and real-estate professionals to solve complex planning challenges – turning tax problems into strategic opportunities. From advanced retirement design to capital-gains deferral, we help clients keep more of what they earn while building long-term wealth. Headquartered in the San Francisco Bay Area, operating with the actuarial, TPA, and compliance infrastructure of Alpha Innovation Partners.

## — OUR SERVICES

### ◆ TAXABLE INCOME REDUCTION

- Defined Benefit & Cash Balance Plans
- Custom 401(k), Solo 401(k), SEP & SIMPLE
- Cost Segregation for real estate owners

*"We help clients legally shift six figures out of taxable income each year."*

### ◆ CAPITAL GAINS STRATEGIES

- Business, real estate & stock exits
- CRTs, Structured Sales & 1031/DST
- Turn tax bills into income streams

*"We turn large tax bills into income streams and planning opportunities."*

### ◆ ADVANCED ESTATE & WEALTH PLANNING

- Private, tax-advantaged income strategies
- Wealth transfer & family legacy design
- Charitable and philanthropic planning

*"We design structures that preserve wealth across generations."*

### ◆ BUSINESS OWNER & EXECUTIVE SOLUTIONS

- Buy-sell arrangements
- Employee & Executive benefits design
- Exit & succession planning

*"We align tax strategy, benefits, and succession into one plan."*

All strategies are supported by coordinated investment management and ongoing advisory oversight, in partnership with Alpha Innovation Partners.