

EXIT STRATEGY FOR TODAY'S REAL ESTATE INVESTOR



MARTINSEN
WEALTH MANAGEMENT

MARTINSEN WEALTH 1031 EXCHANGE

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WHAT IS A DST?

Delaware Statutory Trusts (DSTs), allow owners of real estate to sell their rental properties and potentially defer capital gains taxes. DSTs have become an investment vehicle for *accredited investors who want the benefits of owning real estate without becoming a “landlord”, as well as current real estate investors who no longer want the responsibilities of being a landlord.

WHAT ARE THE MAJOR BENEFITS OF A DST?

PASSIVE INVESTING: Relinquish the responsibilities of managing properties and exchange them for freedom without giving up potential profits.

EXCHANGE TERRIBLE T'S FOR TERRIFIC T'S: Don't be the landlord who dreads answering the phone for fear that the voice on the other end will present you with a Terrible T (tenants, toilets, trash, turmoil). Instead, enjoy retirement with the Terrific T's (travel, time, tax savings).

DIVERSIFICATION: Invest around the country. You choose from investments offering various property types, debt leverage, and location of properties amongst many other attributes.

INCOME GENERATING: Collect monthly income on-time to enjoy the golf course or take the dream vacation you've always wanted.

DISASTER AND EMINENT DOMAIN SOLUTIONS: If your investment property was lost from fire, hurricane, or eminent domain, you can use DSTs in a Section 1031 exchange and defer the capital gains tax, as well as preserve the step-up in basis opportunity.

TAX BENEFITS: Through a DST 1031 exchange defer all capital gain income tax through purchase of like-kind investment property. Don't leave a spouse/heirs unwanted tax burdens or landlord responsibilities.

I EVER TRULY RETIRE? YES, YOU CAN!

Real Estate investing can be extremely rewarding financially. If you have succeeded in your prior real estate investment activities, you may be faced with a new challenge; how do you sell your property without paying income taxes, continue to receive monthly rental income and appreciation, yet not have to continue taking on the responsibility of property management? A Delaware Statutory Trust may be the solution you are looking for.





YOUR WAY OUT OF THE “TERRIBLE T’S”

The Terrible T’s are what an active manager of real estate, or a landlord is responsible for, including toilets, tenants, trips to Home Depot, termites, and time spent. Many people like being real estate investors, but do not like being a landlord, have the time to spend on it, have the skill sets necessary to do it well, or have the energy.



"A DST can be a life-changing solution for owners of highly appreciated property. Now they can retire from being a landlord and STILL receive cash flow, tax savings, and diversify their portfolio with an asset that may appreciate in value."

-Lane Martinsen, President/Founder

REASONS FOR USING A DST 1031 EXCHANGE

1 Diversify your portfolio with stable Cash Flows

Avoid stock market, interest rate, and geographic risk by passively investing in DSTs.

2 Defer taxes when using a DST 1031 Exchange

Keep more of your money by deferring income taxes when it's time to sell investment properties.

3 Retain the ability to receive a stepped-up basis.

Being an *accredited investor is the only requirement you need to own a piece of a DST.

4 DSTs can provide a back-up plan when using a 1031 Exchange

1031 Exchanges have strict timing guidelines to identify & close on investment properties. DSTs eliminate these obstacles since you buy shares quickly & easily.

5 Protect your spouse from unwanted landlord duties

Leaving a spouse with unwanted stress of being a landlord can be a frightening situation. With DSTs, your spouse will be left with passive investments that are paying monthly cash flows.

6 Protect heirs from estate tax and rushed liquidation

1031 Exchanges could eliminate all estate taxes which were once deferred, as well as remove the temptation of liquidating assets too quickly.

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