Steps to Creating your Deferred Sales Trust™

Step 1.

Enter the relevant details of the sale of your real property, business, or other highly appreciated asset at **www.mydstplan.com/mjhughes** or call your EPT advisor who can assist you with the process. This information will be used to evaluate your case.

An experienced Tax Attorney, Trustee and Case Manager will review your case to determine if the DST is a good fit for your transaction.

Step 2.

An introductory conference call is set up to discuss how you can benefit from using a DST for your sale, and a tax deferral illustration is created for you. During this call, the Deferred Sales Trust™ structure will be explained to you and any questions that you have will be answered. Follow-up calls can be scheduled, if necessary, and your own tax and legal advisors are welcome to join.

Step 3.

A conditional engagement agreement is provided to you by the tax law firm, for your review. There is no upfront cost or obligation. Once the conditional engagement is signed, the tax law-firm will establish the trust and engage in preliminary planning. You are under no obligation to proceed or pay for any services unless your sale closes, and you decide to fund the trust. You are simply agreeing to pay for the services rendered by the law firm, if you do choose to proceed.

Step 4.

The tax attorney prepares the documentation and implements the Deferred Sales Trust™ at the close of sale, either through escrow or attorney.

The pre-tax proceeds from the sale are delivered to the Trust, the funds are invested in a manner that is consistent with your risk tolerance and preferences, and payments are made to you pursuant to the payment schedule.