

FAMILY WEALTH PLANNING AND TRANSFER

831(b) SMALL INSURANCE COMPANIES

NON-TRADITIONAL EXECUTIVE BENEFITS

ASSET PROTECTION

PLLC STRUCTURE

MERGERS & ACQUISITIONS

QUALIFIED PLAN ALTERNATIVES

ALTERNATIVES TO BOLI

WORKING WITH CPG

Membership is by invitation only.

If you have an interest in becoming a member of our organization, please email us for an application.

In order to maintain its high standards for membership, CPG has developed a stringent application process that includes background checks, verification of professional experience and professional references.

Contact us at info@CAPPG.com



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Family Wealth Planning & Transfer

831(b) Small Insurance Companies

Non-Traditional Executive Benefits

Asset Protection

PLLC Structure

Mergers & Acquisitions

Qualified Plan Alternatives

Alternatives to BOLI

A collaborative approach...

CAPITAL PRESERVATION GROUP (CPG) is a national alliance of elite independent financial advisory firms, attorneys, and CPAs who work with high income and high net worth clients.

Our alliance is a collaborative effort to bring conservative but creative asset protection and wealth creation strategies to sophisticated clients in local markets. Historically, such strategies have only been available to the upper echelons of the extremely affluent.

This interdependent alliance consists of some of America's finest financial minds and gives local clients and their local advisors access to superior financial strategies.



FAMILY WEALTH PLANNING AND TRANSFER

We believe in a customized, long-term wealth plan that is easy to understand, and we proactively interact with the client's other professional advisors in order to make sure that financial needs and desires are met in a timely and coordinated fashion. The attorneys and other advisors with whom we work understand the perspective of wealthy individuals and families and recognize the special considerations involved in interacting with multiple generations.

831(b) SMALL INSURANCE COMPANIES

The benefits of owning your own Small Insurance Company (CIC's) are numerous. As a group, we have found this to be a powerful financial and asset protection strategy. If implemented properly, the CIC can often solve multiple financial issues with one strategy.

A CIC provides insurance of your choosing, primarily to entities that you or those close to you own or control. Legal experts consider CIC's a very conservative choice for clients who qualify. CIC's can insure risks presently covered via third party insurance arrangements, but at a cost that is expected to be more economical over time. CIC's also have the ability to insure risks that are presently self-insured (i.e., not insured).

NON-TRADITIONAL EXECUTIVE BENEFITS

A well-designed executive benefits program provides incentives that help retain key employees and executives for the longest possible period.

We design, implement and administer executive-only benefit plans that supplement restrictive qualified retirement plans. Our cost-efficient and effective techniques are designed to meet the executive's personal needs and goals within the context of overall corporate financial goals.

We specialize in non-traditional forms of executive planning. These particular strategies use the intellectual property of one or more of CPG's strategic partners and are implemented exclusively by CPG member firms.

ASSET PROTECTION

Our clients count on our asset protection strategies to protect the assets they have spent their life accumulating and growing. Working collaboratively with counsel, the implementation of these strategies significantly improves the client's ability to protect their assets against the claims of creditors. While no asset protection measure offers complete protection, we take a unique approach to this essential area of planning to ensure that these measures are congruent with the clients other financial and estate planning goals.

PLLC STRUCTURE

Our "Preferred" Limited Liability Structure ("P"LLC) is proprietary intellectual property which can only be accessed through CPG. Each PLLC transaction typically requires an independent appraisal of the parties' interests and capital contributions into the "P"LLC.

Given the right set of circumstances, and with the advice of counsel, the "P"LLC can be used to enhance a number of sophisticated planning transactions.

MERGERS & ACQUISITIONS

Our unique M&A strategies have been used very successfully with many types of businesses. These strategies work with entities of various sizes, but are most commonly used in the small to medium and private company markets. We have coordinated our efforts with some of the most prominent attorneys and tax professionals in the US and abroad to maximize value for both parties involved in an M&A transaction.

QUALIFIED PLAN ALTERNATIVES

Large qualified plan balances can have significantly negative consequences for clients if proper planning is not implemented. Ranging from income taxes to estate taxes, these plan accounts can lose as much as 75% of their value to various forms of taxation.

CPG has a number of strategies that effectively address these common problems and help the client preserve the value of these plans for themselves and for future generations.

ALTERNATIVES TO BANK-OWNED LIFE INSURANCE

CPG provides an investment alternative to banks that meets their specific Supplemental Executive Retirement Plan (SERP) objectives, while providing superior accounting treatment and investment returns versus traditional BOLI.

