

THE EXEMPT TRANSFER

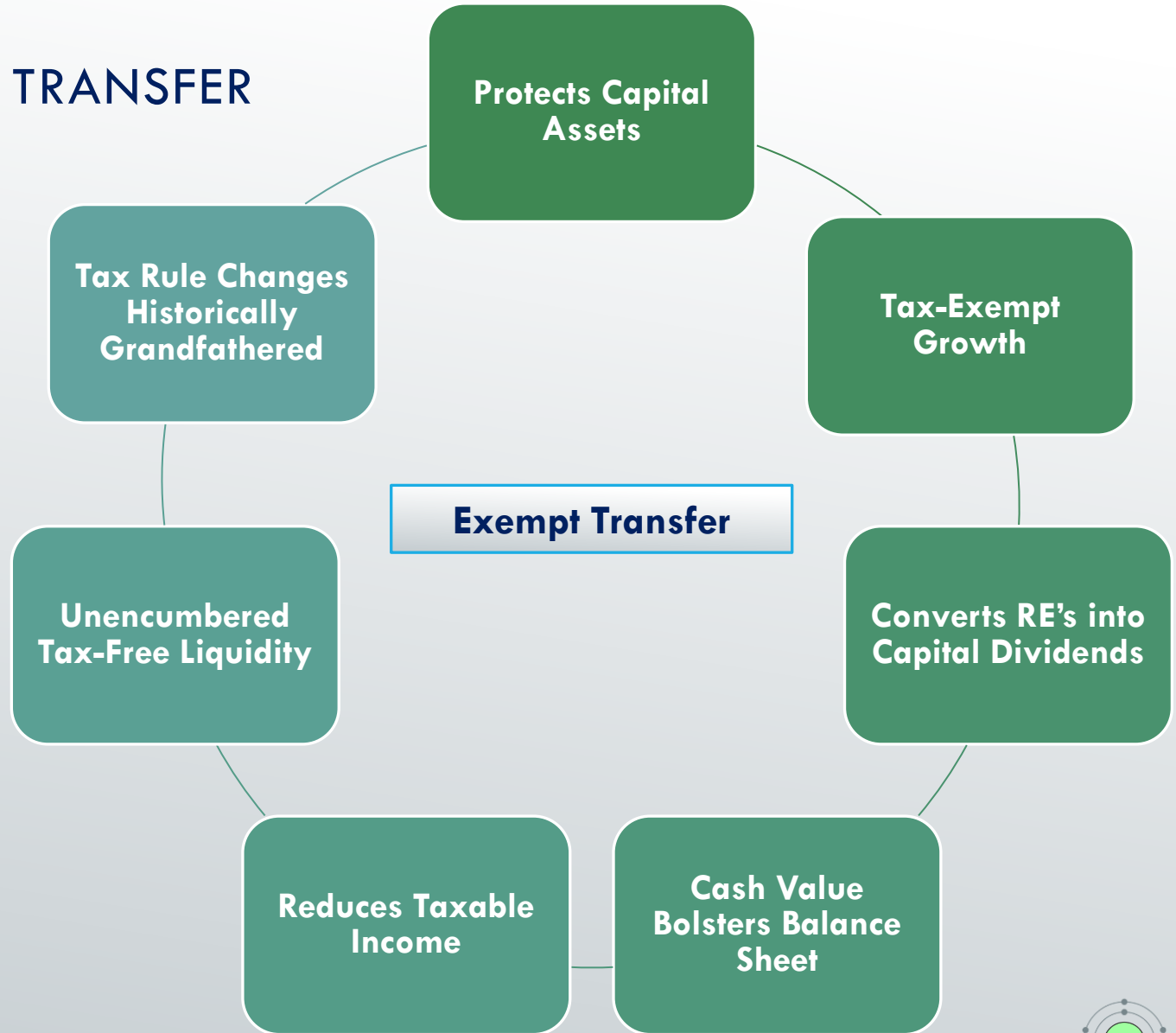
An Overview



CSIPLAN.CA



THE EXEMPT TRANSFER BENEFITS



THE EXEMPT TRANSFER PROTECTS CAPITAL ASSETS



Remove The Need to Sell or Leverage Real Estate to Pay Capital Gains Tax & Recapture

Protecting Capital Assets

Prevent The Need to Sell Investment Portfolio Assets In a Down Market

Maintain Ownership of Important Family Real Estate

THE EXEMPT TRANSFER TAX-EXEMPT GROWTH

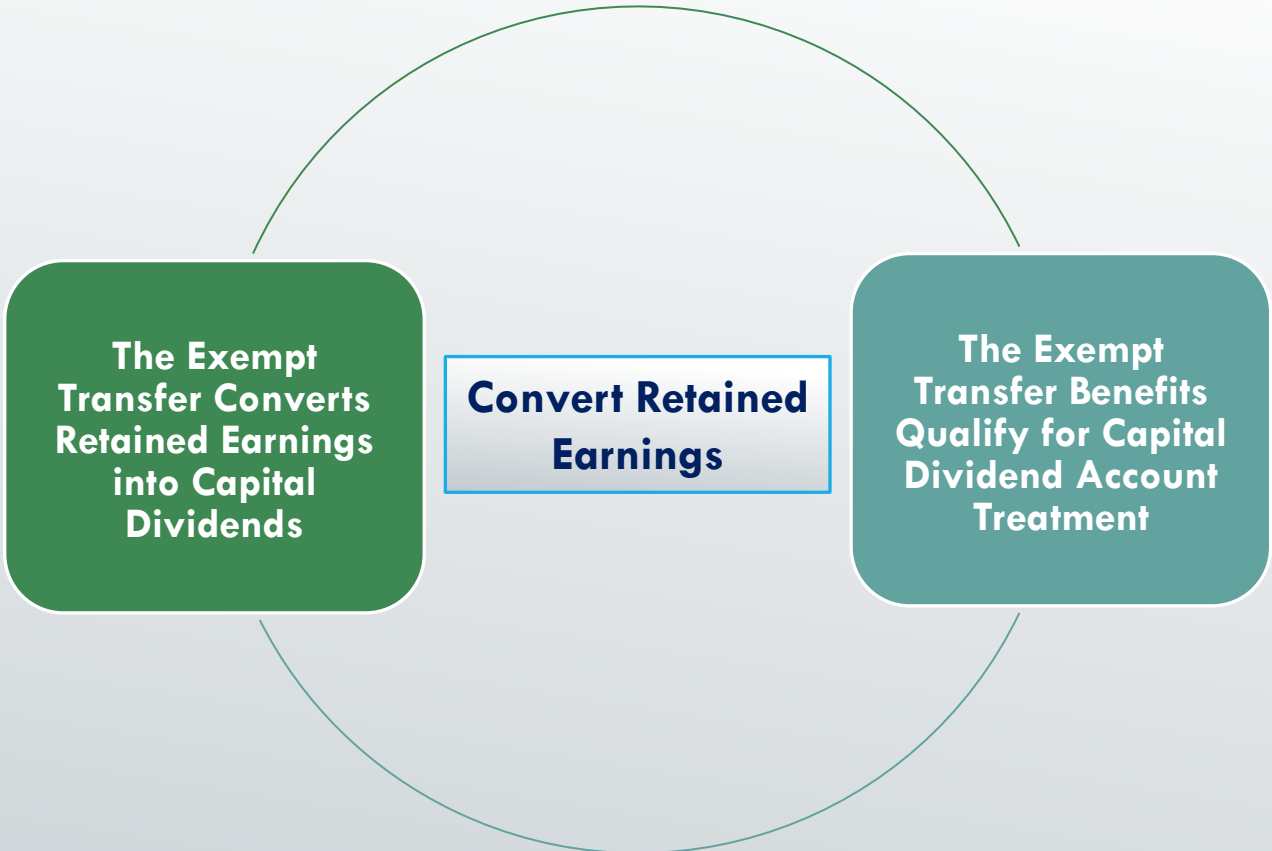


The Exempt
Transfer Returns
are Tax-Exempt

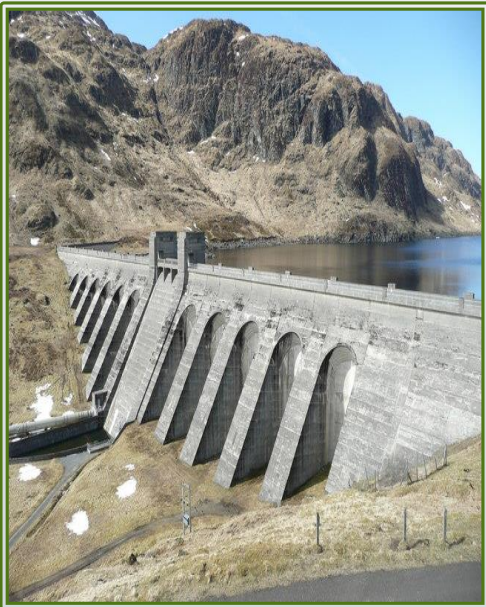
**Tax-Exempt
Growth**

The Exempt
Transfer Reduces
the Impact on SBD
When Passive
Income Exceeds
\$50k

THE EXEMPT TRANSFER CONVERT RETAINED EARNINGS



THE EXEMPT TRANSFER BOLSTER THE BALANCE SHEET



**The Exempt Transfer
Leaves More Money
in the Corporation**

**Bolster the Corporate
Balance Sheet**

**The Exempt Transfer
is a Liquid Asset**

**The Exempt Transfer
Can Be Used as
Collateral**



THE EXEMPT TRANSFER REDUCE TAXABLE INCOME

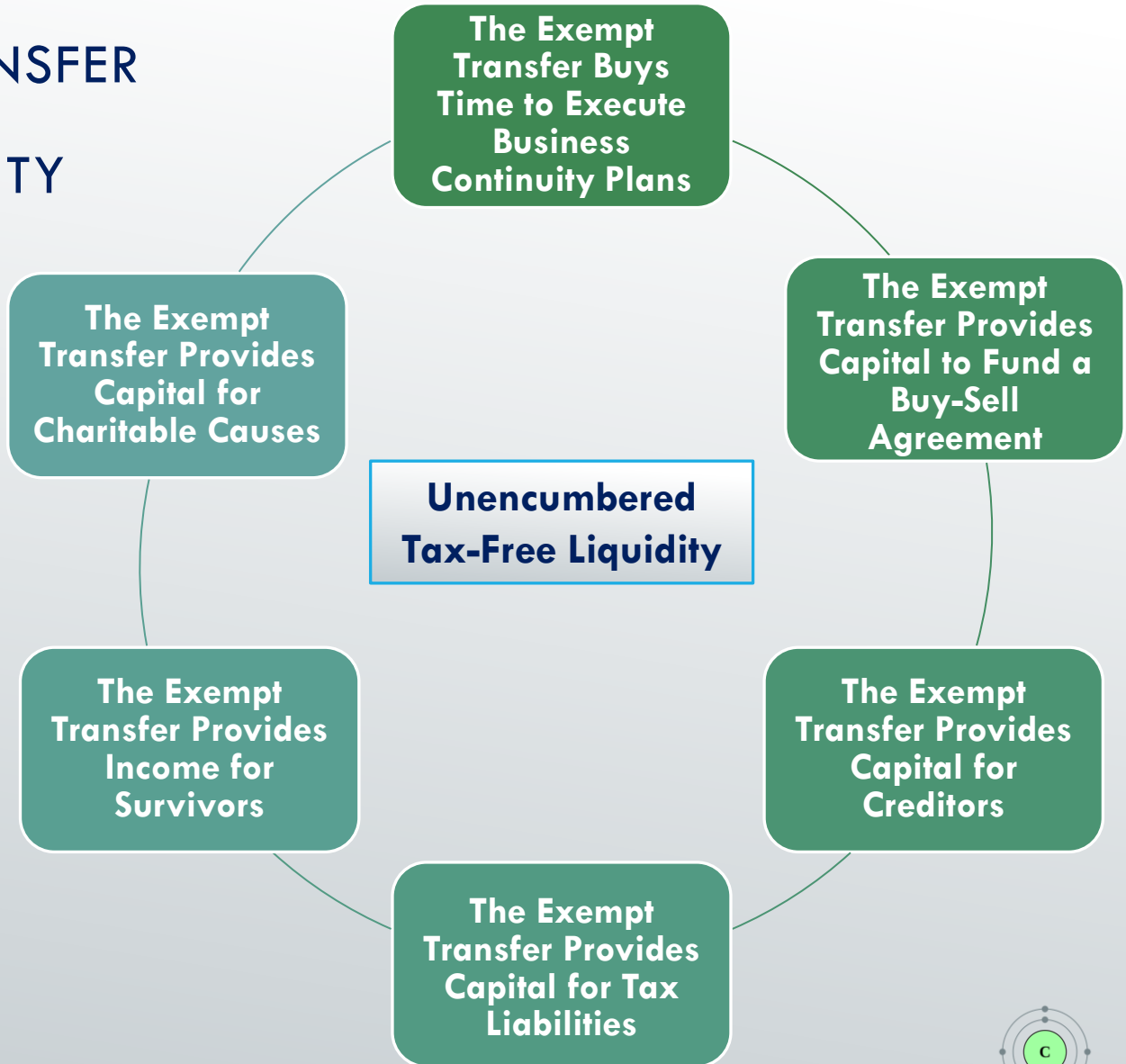


The Exempt Transfer Can Provide Opportunities to Create Deductible Cash Outflows

Reduce Taxable Income

The Exempt Transfer Can Be Used to Support a Tax-Free Retirement Income Stream

THE EXEMPT TRANSFER UNENCUMBERED TAX-FREE LIQUIDITY



THE EXEMPT TRANSFER CONTACT INFORMATION

Aaron Ledlie, QAFP
Independent Insurance Broker
President
aaron@csiplan.ca
Mobile: 705-427-5945

Raymond Matt, CLU, TEP, CHS
Independent Insurance Broker
Founder
raymond@csiplan.ca
Mobile: 416-452-2334

MLP Corporate Solutions Inc.
543 Yonge Street
Midland, ON L4R 2C6
Bus: 705-526-2807
Fax: 705-526-0615
www.csiplan.ca

