

Investment Tax Optimization



Whether you are looking for tax-efficient strategies to reduce your tax burden, re-positioning your retirement funds to less volatility, or utilizing more robust benefit plans to maximize pre-tax investments for you and/or your company, AOG is committed to maintaining the highest standards of integrity and professionalism by providing a high-value proposition and superior personal service.

Gain/Loss Harvesting

We take on a personalized approach when reviewing all of your holdings, including purchase dates of each security, in search of opportunities designed to reduce the impact of taxes on your investments.

Cash Balance Pension Plan

Small business employers can use these tax-efficient retirement savings vehicles as another source of retirement funds while reducing current tax liability.

Roth Conversion

When beneficial to your portfolio, we initiate Roth IRA conversions so that you turn a traditional IRA into a Roth IRA. There's no upfront tax break with a Roth IRA, but contributions and earnings grow tax-free.

Opportunity Zones

Qualified Opportunity Zones allow you to defer capital gains taxes while investing in the economic development of distressed areas within the US.

Land Development/Conservation Easement

Conservation easements provide tax and economic benefits to individual investors while protecting land and its conservation value for future generations.

Oil & Gas Drilling

Diversify your portfolio and take advantage of oil and gas commodities while adding monthly income and participating in lucrative tax breaks.

1031 Exchange

We can guide you through the process of what to do with the proceeds from the sale of your home through the process of a 1031 tax-deferred exchange.

721 UPREIT Exchange

If you are a property owner and you're looking to exchange your property for share ownership in an UPREIT (umbrella partnership real estate investment trust) we can help. You can defer your capital gains taxes by reinvesting in an alternative real estate trust investment.

1035 Life Insurance/Annuity Exchange

We assist investors in transferring an existing annuity contract, life insurance policy, long-term care product to a tax-free investment of like kind.