LEGACY TAX™
CONSULTANTS

Leveraged Trading Losses (LTL)

A powerful tax deferral strategy used by high earners to generate tax losses, with cash ratios of 8:1, without touching real estate or relying on outdated depreciation tactics.

Built on Series LLC architecture, this approach has been quietly used by high-net-worth clients to offset taxable events with a **track record of success**.

15+ Year Track Record	Audit Defense	CPA-Reviewed

Disclaimer: Strictly confidential. CPA and legal teams available upon request.

Who This Is For

- Anyone facing large capital gains
- High-income 1099, K1, Dividends, C-Corp earners making $1M+ annually
- Entrepreneurs selling or exiting a company
- Real estate developers liquidating major assets
- Anyone staring down a $1M+ tax bill and looking for smarter options

Who This NOT For

- W2 Employees
- Roth Conversions
- Gains Under $1,000,000
- Retirement Distributions
- Restricted Stock Options and Units

How the LTL Strategy Works

Structured to provide tax loss in the first year with a rebalancing tax income/gain 15 years later.

- Capital is allocated into a Cell Series LLC
- Each Cell Series engages in leveraged foreign currency trading
- Losses are passed through to the Individual/Entity via K1. These losses can be used to offset income/capital gains from other income sources
- These losses are used to offset current-year income from other sources (active or passive)
- Individual/Entity is responsible for managing LLC assets and investments

Deduction Ratios of 8:1

With LTL, clients will receive an 8:1 tax loss ratio. Meaning for every $1 cash contribution the LLC will receive $8 in losses.

The strategy leverages real trading activity that must occur within the calendar year. Utilizing LTL earlier in the year gives LTC time to issue more trades on your behalf which will increase the overall efficiency of this strategy.

Who Qualifies?

Federal tax liability: $1M+

W2, 1099, K-1, capital gains income

Maxed out depreciation or cost segregation

Seeking IRS-tested solutions

Comfortable with sophisticated structures

Capital available for structured participation

Key Client Benefits

- Offset high-income 1099, K1, Dividends, C-Corp Income earners making $1M+ annually
- Uses real trading activity, not asset depreciation or phantom deductions
- Audit Defense, our LTL strategy has been audited by the IRS and passed
- No real estate or physical assets required
- Top 100 Law Firm could provide a Tax Opinion Letter for additional protection for an additional cost
- Can dramatically reduce tax liability this year, without restructuring your business

Why Clients Choose LTL

Traditional strategies have their limits. But this one was designed for clients who've already exhausted the usual methods and need something more advanced but still flexible.

This strategy has been used by Legacy Tax Consultants (LTC) with a **100% success rate** and oversight from CPAs, attorneys and ex-IRS pros.

LTL is built on advanced tax law, not mainstream shortcuts. It's powerful and rarely seen outside elite planning circles or family offices.

Real-World Examples

These are the kinds of outcomes clients are actually seeing based on real trades and real tax returns…

A business owner with $1M in capital gains used the LTL strategy to wipe out over $300K in tax liability, without restructuring the business or touching a single asset.

A high-earning consultant with $1M in 1099 income used special allocations through a Series LLC and walked into Q1 of the new year with a drastically lower tax bill. This was backed by audit defense and a full legal review.

A real estate developer faced a massive gain after liquidating a project. Instead of letting taxes eat the upside, he used the LTL method to generate losses through strategic leveraged trades, reallocating capital and preserving equity for the next move.

Compliance Is Not Optional

This strategy has been developed by a professional team of tax attorneys, LLM, USCPT, and CMTs.

Each Series is documented with precision. The structure and allocation are implemented cleanly and have historically already passed direct IRS audit.

This is a white-glove service built for clients who take their finances seriously and want their strategy done right.

What The Legacy Tax Consultants (LTC) Do for You

Legacy Tax Consultants (LTC) vetted team of compliance professionals handle every step of the process with precision.

Series LLC entity formation and cell structuring, tailored to the client's needs and investment timing

Full legal and tax documentation, including audit defense, books & record keepings, and tax filings for the LTL

Trade execution, all professionally managed.

Ongoing reporting and coordination with the client's CPA, family office, or advisory firm

Tax Opinion Letter optionally issued by a Top 100 Law Firm for added legal certainty and an additional cost.

To Learn More or Discuss Implementation

Visit

www.LegacyTaxConsultants.com