

BAT SOLUTIONS

BUSINESS • ACCOUNTING • TAX

TAX Strategy Overview

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Our Mission

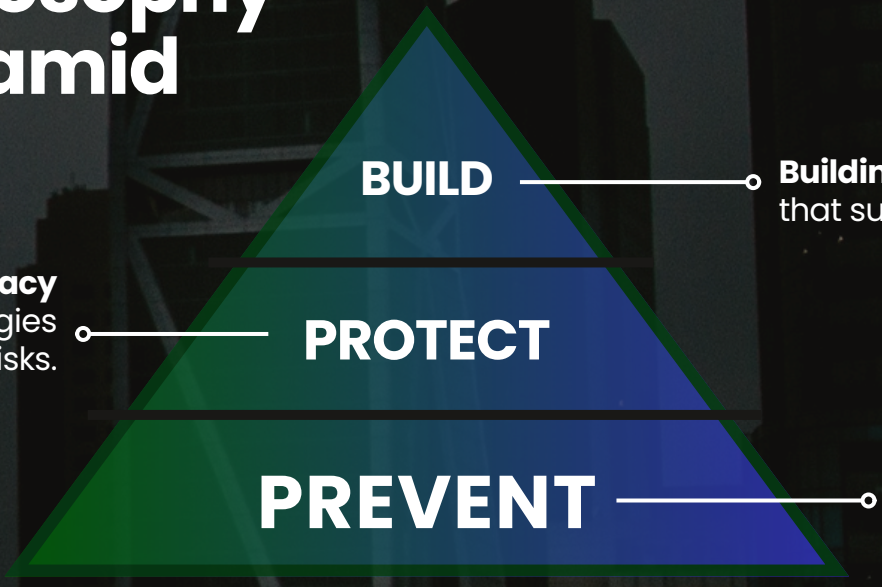
BAT Solutions exists to protect wealth, build legacies, and prevent costly financial mistakes before they happen. We partner with business owners, professionals, and athletes to provide proactive accounting, tax, compliance, and advisory services that create clarity, confidence, and long-term financial success.

We are committed to building trust, wealth, opportunity, and lasting relationships while upholding the highest standards of integrity, accountability, and excellence within our profession and the communities we serve.

Our Vision

To become the most trusted family CPA firm in the Southeast, helping individuals, businesses, and athletes build stronger financial futures and stronger communities.

The BAT Philosophy Pyramid



Building wealth that supports growth.

Protecting legacy with strategies that reduce risks.

Preventing costly mistakes with proactive problem solving & guidance.

1 Alternative Tax-Advantaged Opportunity

We work with a financial group that identifies unique investment opportunities within the medical and healthcare industry. These opportunities involve providing capital to support the research and development of emerging medical products.

Certain investments may also provide investors with a significant charitable tax deduction as part of the overall investment strategy.

POTENTIAL BENEFITS

- **Participation in the development of emerging medical products**
- **Potential significant charitable tax deduction**
- **Opportunity to combine investment capital with charitable impact**
- **Strategy designed primarily for individuals with substantial taxable income**

This opportunity is not appropriate for every taxpayer. The potential tax benefits depend on the specific investment, the investor's individual tax situation, applicable tax law, and proper valuation and documentation.

Additional details regarding the investment structure, tax strategy, risks, and potential benefits are provided to qualified candidates after an initial consultation.

2 Solar Energy Investment Opportunity

OVERVIEW

Turn a Tax Liability Into an Investment Opportunity
For high-income individuals and business owners, a significant tax bill can create an opportunity to evaluate strategies that do more than simply send money to the IRS.

A properly structured solar investment may allow an eligible invest or to participate in a real energy asset while potentially benefiting from valuable federal tax incentives.

POTENTIAL BENEFITS

Federal Tax Credits



Qualifying solar investments may generate federal income tax credits that can directly reduce eligible federal tax liability.

Accelerated Depreciation



Investors may also receive depreciation deductions associated with qualifying solar assets, creating an opportunity to reduce taxable income.

Investment Economics



Unlike simply paying a tax bill, the strategy involves an investment in an income-producing solar asset with potential economic benefits beyond the initial tax incentives.

Who Should Consider?

These Stratgies may be worth evaluating for individuals who:

- ☑ Have significant federal income tax exposure
- ☑ Own a business or receive substantial pass-through income
- ☑ Expect a high-income year
- ☑ Have available capital to invest
- ☑ Want to explore strategies beyond traditional retirement & tax planning



YOUR STRATEGY IS PERSONAL

The amount you invest and the potential tax benefit; depends on your income, tax liability, investment amount, filing status, and overall tax situation.

That is why we don't believe in a one-size-fits-all approach.

Tax benefits are not guaranteed and depend on the specific investment structure, applicable tax law, investor eligibility, and individual circumstances. Investment and tax strategies involve risk and should be reviewed with the appropriate tax, legal, and financial professionals

Moving Forward

– LETS RUN YOUR NUMBERS –

Before making an investment, BAT Solutions can prepare a personalized tax projection showing how these investment could impact your specific tax situation.

Know the opportunity.
Understand the numbers.
Make an informed decision

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