

---

SERVANT  
CAPITAL  
ADVISORS

**Tax  
Strategies**

# Basic Tax Strategies

---

- 401(k) with Employer Match
- Roth 401(k)
- Roth IRA, two-step Roth IRA
- Rollover IRA
- 529 Plan
- Health Savings Account
- Long-Term Capital Gains
- Home & Mortgage Deductions
- Donor Advised Fund

# Advanced Tax Strategies

---

- Variable Universal Life Insurance
- Private Placement Life Insurance
- Solo Roth 401(k), SEP IRA
- Roth IRA Conversion (with Discount & Leverage)
- Real Estate Investing
- Annual Gift Exemptions
- Family LLC
- SLAT, GRAT, IDGT
- Private Foundation

---

**SERVANT  
CAPITAL  
ADVISORS**

**Phil Funk**  
Principal

T. 317-343-9407

M. 317-258-7815

[pfunk@servantcap.com](mailto:pfunk@servantcap.com)

[www.servantcap.com](http://www.servantcap.com)

550 Congressional Blvd, Suite 115  
Carmel, IN 46032