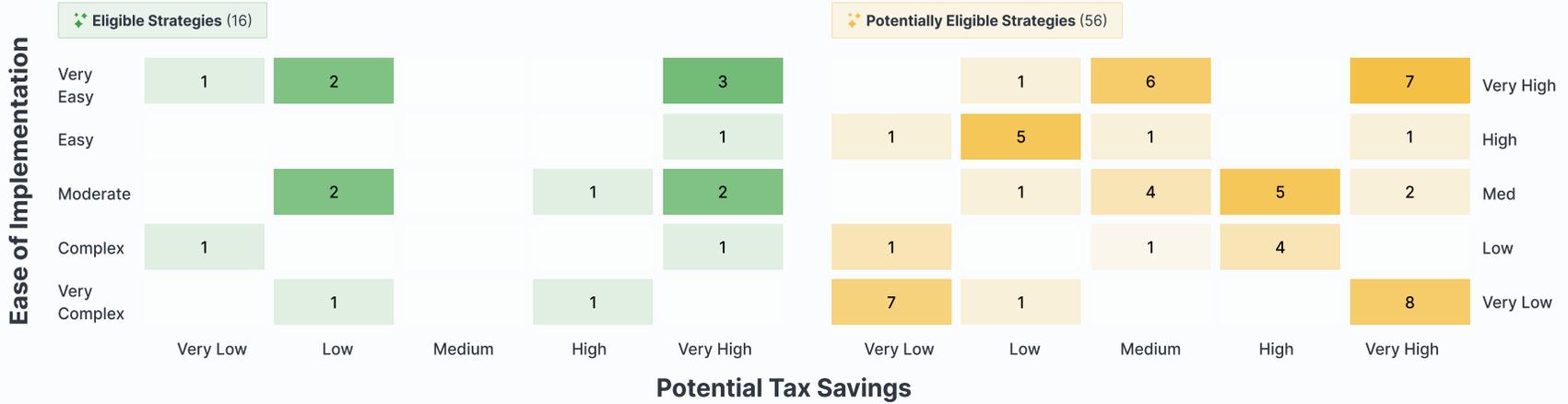


Strategies 110 Total Strategies



Strategies Eligible Strategies (12)

Strategy	Complexity	Savings	Reasoning	Missing Documents
Eligible Backdoor Roth IRA	●●●●●	●●●●●	The client is eligible for the Backdoor Roth IRA strategy because they have sufficient earned income (\$712,781 reported in 2024 wages) and are 52 years old (born 1973), which is below the age threshold.	--
Potentially Eligible Bargain Sales to Charity	●●●●●	●●●●●	The client holds a significant portfolio of publicly traded securities (as evidenced by Form 1099-B data) which could be utilized for a bargain sale strategy. However, the current data does not identify a specific asset designated for such a transaction, nor does it contain a corresponding valuation or appraisal for a specific asset intended for...	Appraisal of asset being sold
Potentially Eligible 529 for K-12 Private School	●●●●●	●●●●●	The client has a 529 plan, as evidenced by the Form 1099-Q distributions. However, the available tax documents do not explicitly identify the designated beneficiary (the 1099-Q notes the recipient is not the beneficiary). Additional documentation identifying the beneficiary is required to proceed with the evaluation.	529 plan account showing beneficiary
Not Eligible Conservation Easement	●●●●●	●●●●●	The client's tax transcripts (RETR) show \$0.00 in Schedule E (Rent/Royalty/Partnership/Estate) income, indicating no real estate holdings reported on Schedule E Part I. As the evaluation logic relies on Schedule E data to identify real estate ownership for this strategy, and no such data exists, the client is determined to have no real estate to	--
Eligible Augusta Rule	●●●●●	●●●●●	The client owns a home as evidenced by the active mortgage reported to the IRS. With majority ownership in a business, the client could consider renting their home out to the business for key	--