

# Enrich your legacy

The premier clean energy finance platform for preserving wealth

Inception Financial is the premier clean energy finance platform for private clients seeking to mitigate their tax liability and enjoy predictable long term yield.

In partnership with family offices, financial advisors and tax professionals, we repurpose our private clients' tax liability to preserve and grow their wealth, legacy and impact.

## The Strategy

Inception Financial offers a tax strategy that reduces Federal and State taxes by generating investment tax credits (ITC) and depreciation expense.

We help our clients establish an energy asset ownership LLC that allows them to redirect tax dollars they would otherwise send to the IRS to purchase solar and energy storage assets – whether from W-2 withholdings or quarterly estimated payments.

This strategy can offset both active and passive income, and based on the individual client's tax liability and state of residence, may deliver an immediate post tax savings of up to 30%.

As these funds are simply a redirection of tax dollars, this strategy can be implemented with essentially no money out of pocket while also being non-dilutive to other investments. Our clients' can then use this "found money" to invest into other opportunities.

Plus the strategy can be employed year-over-year, and the benefits compound.

## A Proven Approach

Since the 1980s, the world's largest banks, corporations and other institutions have been using this tax mitigation strategy successfully, including Morgan Stanley, Goldman Sachs, Google, and others. As such, the tax law in this area is well established and fully codified.

Now, Inception Financial is making these tax benefits accessible to select private clients for the first time.

Given our long-standing relationships and credibility in the energy industry, we have access to consistent asset inventory. We have the flexibility to assist clients with their tax planning strategies over multiple years.



Inception Financial offers a tax strategy that reduces Federal and State taxes on active and passive income by generating investment tax credits (ITC) and depreciation expense.

## Getting Started

- 01 ● We align with each client's tax professionals and advisory team
- 02 ● We model the potential tax savings
- 03 ● Client makes an equity commitment
- 04 ● We form an LLC for client
- 05 ● Most clients work with their CPA to reduce withholding on bi-weekly paychecks or quarterly tax payments and redirect these funds to buy the solar and/or energy storage assets
- 06 ● Client reviews and signs:
  - Client Acknowledgement Form
  - Asset Purchase Agreement (which defines the sale of the assets)
  - Technical Services Agreement (which defines our responsibility to ensure the assets remain operational)
- 07 ● Client purchases solar and energy storage assets periodically via a Bill of Sale (typically monthly)
- 08 ● We ensure assets stay operational and deliver electricity
- 09 ● We provide necessary tax filing documentation to CPA
- 10 ● Client receives tax benefits