

Sevens Report Alpha Webinar:
How Opportunity Zones Can Help Your Clients
With Steve Glickman, CEO of Develop LLC

Thursday, February 20th, 2020
Tom Essaye, President Sevens Report Research

Goals for today's webinar

- What Are Opportunity Zones and How Can They Benefit High Net Worth Investors?
- Why Were Opportunity Zones Created?
- What Are the Tax Benefits?
- What Are Opportunity Funds and How Do They Work?
- What Type of Investors Are Opportunity Funds Suitable For?
- What is the Opportunity Zone Index?
- Where Can You Learn More if This Is a Potential Solution for a Client?

What Are Opportunity Zones and How Can They Benefit High Net Worth Investors?

Why Were Opportunity Zones Created?

What Are the Tax Benefits?

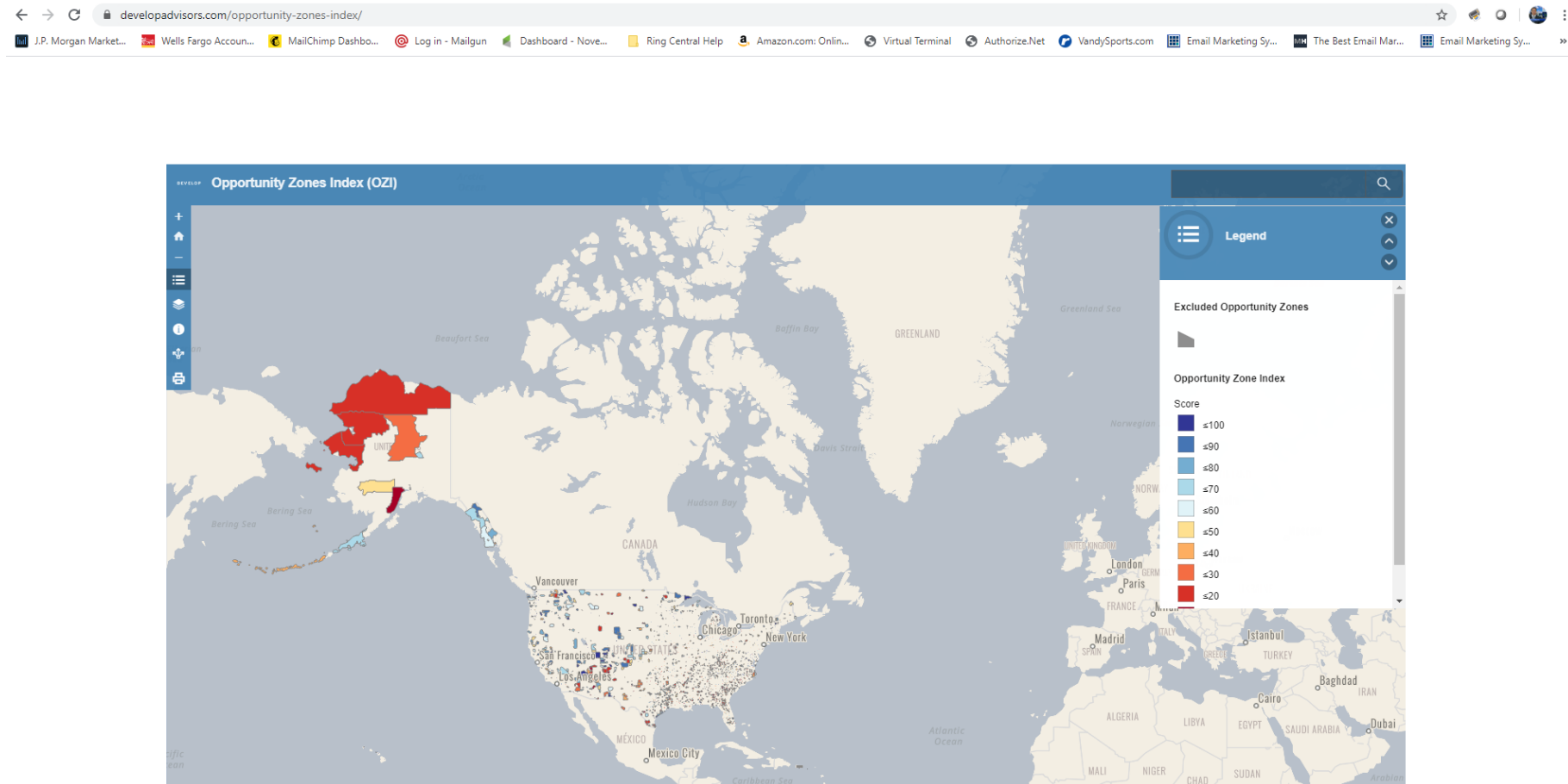
From Develop LLC's website:

- Investors who have capital gains, can defer paying their capital gains tax until December 31, 2026, for gains that are reinvested into a qualified Opportunity Zone Fund (think a 401(k)).
- If investors remain invested in their Opportunity Zone Fund for longer than 5 years, they receive a 10% discount on their original capital gains tax bill, and a total of a 15% discount on their capital gains bill after a 7-year investment.
- For the most patient investors, those who hold their stake in an Opportunity Zone Fund for 10 years or more, they will pay no capital gains taxes for any appreciation of their investment in the fund for as long as they remain invested in that fund (think a Roth IRA).

What Are Opportunity Funds and How Do They Work?

**What Type of Investors Are Opportunity Funds (or
Investment in Opportunity Zones) Suitable For?
Is It Just for Accredited Investors?**

What Is the Opportunity Zone Index?



Where Can You Learn More if This Is a Potential Solution for a Client?