

SAGE *Solutions*

Fees & Taxes vs Sage Hill Solutions

An Affluent Family's "Cost of Doing Business"

Estate Taxes	35%
Gift Taxes	35%
Income Taxes	36 %
Investment "Wrap" Fees	2%

Sage Hill Estate Planning, Income Tax Planning & Mgt, Investment Design and Mgt

0.10% – 0.30% x Net Worth

In many Sage Hill client relationships, we are able to maximize the legitimate tools available to us to eliminate estate and gift taxes, reduce income taxation, and significantly reduce costs of investment management fees and transaction costs and of insurance premiums.

At Sage Hill we *touch* every asset to maximize its financial and tax efficiency and to enable its passing through generations seamlessly. As such, every strategy must integrate the asset's economic viability, estate tax impact, income tax impact, and critically the ability to retain family businesses through generations functionally and with sensitivity to all family members' interests. To this end, our fees relate to our clients' total life...and traditionally enable much greater efficiencies and value for your total fee dollar paid to your advisory group. The higher level of professional services accomplished by Sage Hill in coordination with legal, tax, investment, and risk management professionals is traditionally significantly less than one's fee, commission, and tax dollars previously expended.

Our clients' wealth is worthy of being treated in a very functional businesslike manner. To that end, we believe that Sage Hill offers a significant value relationship with our client families.

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