

CONTACT INFORMATION

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ELYSIEN

PRIVATE WEALTH & REAL PROPERTY

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Client Case Studies

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PRIVATE CLIENT - Corporate Executive, Sun Microsystems

Project: Corporate relocation from Northern California. Client needed to liquidate and purchase a primary residence, obtain a mortgage, liquidate a concentrated stock position, transfer an old retirement account and establish a comprehensive risk management strategy for himself and his wife.

Solutions: We were able to utilize our real estate professionals to secure a primary residence, while coordinating a 1031 exchange with the broker in California to secure his local property and alleviate capital gains tax concerns. Our lending advisory service assisted him in obtaining a loan at an interest rate $\frac{1}{2}\%$ lower than comparable programs in the area. His concentrated stock position was a serious risk to his portfolio because he had over 50% of his assets in company stock. We were able to find an exchange fund where he pooled his concentrated stock with other investors with similar issues. This allowed him to diversify his portfolio while retaining his initial tax basis. We then went to work re-designing his portfolio and rolled over his old IRA in order to reposition his assets to a long-term growth position. Once these goals were accomplished, we collaborated with our estate planning and insurance experts to set up an irrevocable life insurance trust (ILIT) and found him a cost effective policy that would protect his family and estate. Since that time, our client has been very pleased with our services and has established a banking relationship with our firm for his personal assets.

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CORPORATE CLIENT - Joint Venture, City of Tempe / Arizona State University Mixed-Use Development

Project: Mixed-use construction project competitively bid at a total cost of \$188 million dollars. Project included a nationally-known hotel chain, a convention center for the city, and alumni condominiums for Arizona State University located in the downtown area of Tempe. Project needed building capital and organization for joint venture partners, as well as the management of tax credits from the city.

Solutions: We were able to advise our client on the lending environment and engaged a national private equity firm to assist in the joint venture project. Once we had infused capital for the project, we assisted the client with financing for the initial phase of construction of the convention center and hotel franchise through an international investment banking firm. We were able to coordinate our services with various law firms, partners, and the city planning commission to simplify and provide a hassle-free experience for our client. We will assist the client with financing the various future phases of the project, including the two condo towers for Arizona State University, once the first phases of the project are completed.

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Client Case Studies

3 PRIVATE & CORPORATE CLIENT - Chief Executive Officer, Las Vegas-based Manufacturing & Tooling Firm

Project: Client needed to refinance a term loan for his existing building and manufacturing headquarters. He also engaged us regarding the establishment of a benefits plan for his employees. Client also requested an overview of his defined benefit program and IRA, and needed to secure funding for the construction and completion of his primary residence.

Solutions: We were able to identify a strong commercial real estate lender that converted the commercial term loan into a fixed rate mortgage amortized over 20 years. This allowed our client to retain his current payment schedule without rate adjustments or balloon payments in later years. By reviewing his business model and finances we were able to establish a 401(k) plan and brought in our insurance advisors to establish a group health and life insurance program. We were then able to set our client up with a qualified retirement plan that allows him to deduct significant portions of his salary into a tax deductible vehicle in addition to his company's 401(k) plan. These services were coordinated with our tax consultants and our client's attorney. Once these programs were established, we secured funding through a local bank for his personal residence through a one-time-close construction-to-permanent loan.

CONTACT US TODAY TO LEARN MORE ABOUT PARTNERING WITH ELYSIEN PRIVATE WEALTH.

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