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The Q4 Tax Playbook

COMING UP FAST

Programs sell out before year-end.

Mid-Dec
Oil and gas funds projected to sell out

Dec 17
P3 Method™ must start

Dec 20
Fee Simple Land and Medical Donations

Dec 31
Developmental drilling, Charitable planning

IF THIS IS YOU	YOUR MOVES
1 High income earner?	Charitable 5:1 program Dec 20 · Solar credits Rolling · Oil and gas funds Mid-Dec · Developmental drilling Dec 31 · Bonus depreciation Varies
2 Selling a business, property or big investment?	P3 Method™ Dec 17 · Charitable planning Dec 31 · Solar credits Rolling
3 Want charitable giving to do more?	Fee simple land donation Dec 20 · Charitable 5:1 program Dec 20 · P3 Method™ Dec 17
4 Own a business?	Cash balance / Solo 401(k) Filing date · Micro captive Varies · Solar credits Rolling · Bonus depreciation Varies
5 Holding a large IRA or company stock?	P3 Method™ Dec 17 · Charitable planning Dec 31
6 Planning ahead for 2027?	Cost segregation Next window · IRA bailout plan Anytime · International tax Anytime · Bonus depreciation Varies · Carbon credits Anytime

Not sure which apply? Take this diagnostic

beyondwealthcollective.com/q4-tax-check

Educational overview only, not tax, legal or investment advice. Availability, minimums and deadlines are not guaranteed and may change; some options are limited to accredited investors and carry risk. Review any strategy with your CPA or tax attorney before acting.

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The breakdown

Row numbers match page 1.

Act in December

Hard deadlines, soonest first

Dec 20 — ROW 1, 3

Charitable 5:1 program

DOES	Deduction up to 50% of AGI, five-year carryforward.
FOR	Accredited investors, $25k minimum.

Dec 17 — ROW 2, 3, 5

P3 Method™

DOES	Charitable deduction of 80%+ on an appreciated asset; can fund Roth conversions.
FOR	Appreciated assets of $250k+, NUA stock or a Mega-IRA.

Dec 20 — ROW 3

Fee simple land donation

DOES	Deduction up to 30% of AGI. Higher risk; IRS disclosure required.
FOR	Accredited investors, $20k minimum.

Mid-Dec — ROW 1

Oil and gas funds

DOES	Deducts about 70–75% of the investment in year one.
FOR	$250k+ income or a one-time bonus, options or severance.

Dec 31 — ROW 1

Developmental drilling

DOES	Longer-term drilling investment with a large first-year deduction.
FOR	$300k+ taxable income.

Dec 31 — ROW 2, 5

Charitable and legacy planning

DOES	Cuts income, gains and estate taxes; can create income.
FOR	A windfall, a big 2026 tax bill or appreciated stock.

Rolling or later

Limited capacity, no fixed year-end date

Rolling — ROW 1, 2, 4

Solar programs

DOES	Tax credits directly or via a battery business. First-come, first-served.
FOR	$200k+ federal tax this year or $300k+ over 3 years; 100+ hours.

Varies — ROW 1, 4, 6

Bonus depreciation programs

DOES	100% first-year depreciation through the programs we offer, including equipment leasing.
FOR	$300k+ passive fund or $250k+ active LLC.

Varies — ROW 4

Micro captive (831(b))

DOES	Deductible premiums to insure rare business risks.
FOR	Owners able to commit four years.

Additional opportunities to consider

NOT Q4 TIME-SENSITIVE

- Cash Balance Plans / Solo 401(k)
- Cost Segregation
- International Tax Planning
- IRA Bailout Plan
- Pre-Tax Wealth Creation

See a fit? Bring this page to your next advisor call.

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