

From Orchard to Income: Your Tax-Smart Exit Strategy

Turn your hard work into wealth that works for you and your heirs.

As a dedicated pistachio grower, you've invested years nurturing your orchards. When considering the future, it's essential to have a strategy that honors your legacy and secures financial stability for you and your family. At Strong Valley Wealth and Pension, we have experience guiding agricultural business owners through pivotal financial decisions, helping to preserve your life's work and achieve your goals.

Common Challenges in Transitioning:

- **Complex Financial Decisions:** Determining the best path forward can be overwhelming, especially when balancing immediate financial needs with long-term objectives.
- **Tax Implications:** Without proper planning, the sale of your agricultural assets could result in significant tax liabilities, potentially diminishing the wealth you've built over the years.
- **Valuation Difficulties:** Accurately assessing the value of your farm and its assets is crucial but can be challenging, leading to potential undervaluation or disputes during the sale process.
- **Emotional Attachment:** Letting go of a business you've built can be emotionally taxing, making objective decision-making more difficult.

How We Can Help:

- **Legacy Planning:** We work with you to develop personalized plans that ensure your estate benefits your loved ones and reflects your wishes.
- **Tax-Efficient Exit Strategies:** Our team designs approaches to help you transition from active farming while aiming to minimize tax burdens.
- **Simplifying Complex Decisions:** We break down intricate financial choices into clear, manageable steps, providing clarity and confidence.
- **Navigating Capital Gains Challenges:** We assist in understanding and addressing potential capital gains implications, helping you retain more of your hard-earned wealth.
- **Income-Producing Investment Options:** We identify opportunities to generate ongoing income post-transition, ensuring financial stability for you and your heirs.



WHY *CHOOSE*
STRONG VALLEY?

TAKE THE NEXT STEP



Our team, including Jason Rankin, CFP®, understands the unique challenges faced by farmers and agricultural business owners. We are committed to providing straightforward, personalized advice tailored to your specific needs.

Ready to explore how you can transition your hard-earned efforts into lasting financial security? Schedule a meeting to discuss strategies aligned with your goals.

Jason Rankin, CFP®
(559) 384-2600
Jason@StrongValley.com
<https://strongvalley.com>



STRONG VALLEY
WEALTH & PENSION



www.StrongValley.com

MAIN (559) 384-2900 DIRECT (559) 384-2600 FAX (559) 384-2888
5 River Park Place W, Suite 205, Fresno, California 93720

Investment advice offered through Strong Valley Wealth & Pension, a registered investment advisor.