



Tax Planning



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Feliciano Financial does not offer legal or tax advice. Please consult the appropriate professional regarding your individual circumstance.

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Tax Planning

Tax planning and financial planning are closely related to each other because of the significant impact that taxes have upon your finances. Any investment made more attractive by the timing of the profit or the way it is taxed is a tax incentive investment.

Tax-Advantage Investments

Tax incentive investments are based on specific provisions. The tax law provisions enacted by Congress encourage investment capital to flow directly into the basic areas of our economy such as housing, petroleum, manufacturing and agriculture. In one sense, “tax incentive” means investing in vital industries in a way that permits you, rather than the companies you invest with, to keep the tax benefits, while retaining your opportunities for significant profits. As in the above quote by Judge Learned Hand, formerly of the New York Supreme Court, there is nothing illegal or immoral about tax incentive investments.

There are many forms of tax incentive investments. Municipal bonds and unit investment trusts provide tax-free income. Annuities, life insurance policies, IRAs, Keoghs and pensions, as well as oil and gas drilling, equipment leasing, research and development in various forms provide tax reduction through income tax deferral of taxation on the appreciation until the asset is liquidated.

Although an investor can structure an individual transaction, tax shelters are often structured as partnerships. There are two types of partnerships: a limited partnership and a general partnership. In a partnership, the value of the investment will be a blend between tax

advantages and investment advantages depending on the objectives of the partnership.

Planning for Retirement

A secure, comfortable retirement is every worker's dream. And now because we're living longer, healthier lives, we can expect to spend more time in retirement than our parents and grandparents did. Achieving the dream of a secure, comfortable retirement is much easier when you plan your finances.

Call us today at 903-533-8585.

The Feliciano Financial Group has been in business since 1983 serving individuals, families, businesses and professionals throughout Texas. Our open and process-driven, client-centered approach, has helped make us one of the fastest growing and established financial services firms in Texas.

Our Commitment to You

- To conduct our business according to high standards of equity, honesty and fairness.
- To provide competent, prompt, client focused service which, in the same circumstances, we would expect for ourselves.
- To treat all clients with fairness and equity, to assure the best value possible.
- To remain your life-long financial partner to take care of your ever-changing needs.
- To help you reach your life's financial goals by understanding what is important to you.



Jose Feliciano, CFP, CLU, ChFC
Founder and President

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