

# Introducing the Model Q™ Installment Sale Trust: A Revolutionary Tool for Capital Gains Deferral

*A powerful new tool for capital gains deferral that features both revocability and profit sharing*

TUCSON, AZ, USA, November 6, 2023 /EINPresswire.com/ -- Today, we are thrilled to announce the launch of the Model Q™ [Installment Sale Trust](#), a groundbreaking financial instrument designed to empower individuals and businesses with a powerful new tool for capital gains deferral that features both revocability and profit sharing.

The Model Q™ Installment Sale Trust, also called the IST, is the brainchild of a team of experts in finance, taxation, and estate planning who saw the need for a more flexible and efficient solution for deferring capital gains taxes. It combines the asset protection and privacy benefits found in Trusts with several unique features designed around allowable incidents of ownership and control that will not void related party issues found when using the Installment Method for gains deferral according to IRC 453. This approach allows investors to strategically plan their tax liabilities without using an Irrevocable solution like a 1031 Exchange or Charitable Trust.

Key features and benefits of the Model Q™ Installment Sale Trust include:

1. Capital Gains Deferral: The Model Q™ Installment Sale Trust allows investors to defer capital



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gains tax on the sale of appreciated assets.

2. **Flexibility:** Unlike traditional irrevocable trusts, the IST is revocable, giving investors the ability to make changes or even dissolve the trust, providing a level of flexibility that is unparalleled in the world of capital gains deferral. Other Capital Gains deferral or elimination techniques are irrevocable once selected. Not the Model Q™ Installment Sale Trust!
3. **Control:** While Investors cannot retain direct control over a third party managed Trust without violating related party rules, Investors can control the timing of installment disbursements and structure of the payments received and can also maintain limited veto-only powers over Trust withdrawals through account control agreements over the assets held within the Trust. Investors also have the ability to revoke the Trust and Installment Agreement at any time. This gives the Investor the ability to adapt to changing financial circumstances. Simply pay the Tax owed in the year the Installment Agreement is terminated if a better deal presents itself.
4. **Profit Sharing:** The Model Q™ Installment Sale Trust is unique in allowing for Profit Sharing of IST performance returns experienced during the management of the Trust.
5. **1031 Exchange Rescue:** The IST can be customized and administrated for use in the return of funds held in escrow over time by any Qualified Intermediary.
6. **Expert Guidance:** ISTs are professionally managed by a team of industry experts with over 100 years of combined experience with Capital Gain deferral techniques for Business and Property owners like Irrevocable Installment Trust variants, Charitable Trust variants, 1031, 1033 and 1042 exchanges and more. Investors that choose to use the IST have access to a deep pool of knowledge and experience with regards to many advanced planning tools.

"We are excited to bring the Model Q™ Installment Sale Trust to the market, as it represents a game-changing innovation in the realm of capital gains deferral. The IST provides for both the sharing of profits and a revocable solution to help investors and professional plan precisely for the impact of long term capital gains." said Kevin Brunner, a previous Forbes Advisor of the Year, creator of Model Q™ and Founder of [Qualified Financial](#). "We believe in competition in the marketplace and that the best product structured for the benefit of the investor will prevail over all other less flexible solutions."

The Installment Sale Trust is set to be a game-changer for investors and professionals seeking tax efficiency and flexibility in managing their assets.

For more information about the Installment Sale Trust, please visit [www.no1031.com](http://www.no1031.com) and request a complimentary ProForma report or IST Illustration.

About Qualified Financial: Qualified Financial is a Tucson-based financial institution with branch offices in Orange, California and Beverly Hills, California and specializes in innovative trust

solutions, tax strategies, wealth management and personalized service. With a commitment to empowering individuals and businesses with versatile financial tools, the Qualified Financial team is dedicated to helping clients achieve their financial goals.

About Model Q™: Model Q™ is risk management strategy that favors fixed and variable fixed return asset classes over publicly traded, listed securities. Model Q™ manages cash balance and cash flow requirements without being subject to systemic market risk factors that impact nearly every other risk management strategy. Model Q™ was designed specifically for the need to address direct fixed income needs over performance returns.

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