

New White Paper Explores IRS Definitions of Allowable Uses of the Installment Method and Structured Sales

An Analysis of Installment Sale and Structured Sale Language used in IRS Publications and Rulings

TUCSON, AZ, USA, December 6, 2023 /EINPresswire.com/ -- [Q-Financial](#), Inc, a leading authority in Installment Sale Trusts, is pleased to announce the release of its latest white paper, "Analysis of Installment Sale and Structured Sale Language used in IRS Publications and Rulings". This comprehensive guide provides valuable insights into the Internal Revenue Service's (IRS) definitions and guidelines for correct application of the Installment Method for transactions that seek to defer capital gains taxes through Trusts, Special Purpose LLCs, 1031 Exchange Rescues.

The Installment Method is a widely-used accounting technique, allows businesses and individuals to defer the recognition of income over an extended period when certain conditions are met. While Tax Advisors and Attorneys are trained on the basics of the use of the Installment Method, advanced applications are frequently misunderstood.

Key highlights of the white paper include:

1. In-depth Review of IRS Guidelines for Related Parties and Allowable Safe Harbors: A detailed



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examination of the IRS regulations and definitions related to the Installment Method and IRC 1031, providing precise definitions.

2. CA FTB Notice 2019-5 Imposing Failure to Withhold Penalty Against Qualified Intermediaries in certain improper Like Kind Exchanges: CA FTB Notice 2019-5 is examined for a single states process for allowing a return of escrowed funds from a failed 1031 Exchange over time using the Installment Method.

3. Structured Installments: Precedence is established for substitution of Obligors and allowable changes to Installment Note terms that will not trigger a change of disposition to original sellers seeking to use the Installment Method.

4. IRS Definition of Asset: Exact language is reproduced for which Assets may be allowed use of the Installment Method.

5. "The Pledge Rule" and Allowable Note Terms: Exact language is reproduced for which Assets are subject to "The Pledge Rule" and IRS guidance as to allowable promissory note terms.

Q-Financial's white paper serves as a comprehensive guide for businesses and individuals seeking a nuanced understanding of the IRS definitions governing the Installment Method," said Kevin Brunner, founder of of Q-Financial and creator of "Model Q™". "We believe that this resource will empower Tax and Estate Planning professionals and Qualified Intermediaries to make informed decisions with regards to the key differences between the acceptable use of Installment Notes vs how those Notes can be structured to maintain Installment Method gains reporting because of a lot professionals simply don't read the language the IRS uses before making blanket recommendations that cost investors unnecessary tax liabilities."

To access the white paper, please visit www.Q-Financial.com or www.No1031.com and request your copy.

About Q-Financial: Q-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 Q-Financial team is dedicated to helping clients achieve their financial goals.

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