



Wealth Concepts Group Reveals Strategy to Cut Taxes on Roth Conversions by 35%

HOUSTON, TX, UNITED STATES, July 14, 2025 /EINPresswire.com/ -- The Best Way to Save on Roth Conversion Taxes That You've Probably Never Heard Of

Wealth Concepts Group has just announced a powerful strategy that can help retirees cut the tax cost of Roth IRA conversions by 35% in 2025.

The secret? Applying valuation discounts to LLC interests held inside self-directed IRA.

Our strategy uses IRS-approved valuation methods to legally reduce the fair market value (FMV) of assets being converted from a traditional IRA to a Roth IRA. When the FMV is lowered, so is the taxable income generated by the conversion—meaning you pay less in taxes.

"Roth conversions are one of the best tools for long-term tax reduction planning," says D. Scott Kenik, Founder and Principal of Wealth Concepts Group. "But the upfront tax cost can scare people away."

By applying the right valuation discounts to LLC interests, our clients can convert more—and pay significantly less in taxes. It could mean saving hundreds of thousands of dollars."

How It Works:

- Valuation Discounts: We apply legitimate LLC discounts to lower the value of your LLC interest by at least 35%.

- Fully IRS Compliant: We follow all IRS business valuation rules and use qualified, defensible appraisals by certified specialists.

- Audit Ready Documentation: Clients receive detailed reports to support the valuation in case of an IRS review.

- 2025 Planning Window: This opportunity is for Roth conversions done in the 2025 tax year. With tax rates expected to rise, now is the time to act.

Our tax reduction strategy builds on existing IRS rules and court decisions that already recognize

valuation discounts for estate and gift tax purposes. Now, we're applying those same principles to Roth IRA conversions—with great success.

"We take care of every step for our clients," Kenik explains. "Our Diligence Process includes everything—IRS revenue rulings, court cases, sample LLC agreements, and valuation reports. And we always start with a Roth Conversion Analysis to weigh the benefits of converting vs. the cost of not converting."

With our souring national debt, taxes are bound to rise. This makes 2025 the perfect time to lock in lower tax rates and minimize taxes on your Roth conversion.

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