Asset Preservation Strategies CEO Greg Banner Took the Stage at The Marcus Evans Private Wealth Management Summit

Presenting to an esteemed audience, Greg Banner shared valuable insights in his presentation, “Navigating the Unknown: Tax Planning and Legislative Uncertainty”

Greg Banner, CEO and Wealth Adviser at Asset Preservation Strategies

Collaborative Wealth Management

SAN DIEGO, CA, UNITED STATES, July 21, 2026 /EINPresswire.com/ -- An established wealth advisor with more than 30 years of dynamic experience, Greg Banner, CEO at Asset Preservation Strategies, was tapped by Marcus Evans to share an exclusive presentation at the June 2026 Summit. Tax planning has never been more complex. With shifting regulations, evolving global tax frameworks, and political uncertainty, wealth managers and family offices face significant challenges in safeguarding assets and optimizing after-tax returns. Greg Banner shared proactive approaches for managing risk and capitalizing on opportunities in an unpredictable legislative environment. Topics in the powerhouse session included: Qualified Opportunity Zones, Tax Loss Harvesting, QSBS, Real Estate Toolkit Essentials, Oil & Gas, Private Placement Life Insurance, Concentrated Stock Positions, Deducting Advisor Fees, Estate Tax Planning, Charitable Planning, Advanced Trust Planning, and State Tax Planning.
“My vast experience with ultra-high net worth clients has provided me with a keen

understanding of how to plan for, and respond to legislative uncertainty with complex financial portfolios. Educating industry peers on how to apply these techniques in their respective practices is both rewarding and inspiring.” -Greg Banner, CEO and Wealth Adviser at Asset Preservation Strategies

About Asset Preservation Strategies, Inc.:
Asset Preservation Strategies offers collaborative wealth management for affluent individuals and families. For nearly 30 years, their team of experienced financial advisors has specialized in working closely with affluent individuals and families to create customized client portfolios, incorporating sophisticated tax planning and advanced estate planning strategies, in careful collaboration with each professional that plays a part in handling the client’s finances. As fiduciaries, the team at APS is not only required by law to keep clients’ interests first, but their passion and primary goal is to advance responsible stewardship of assets and achieve the best possible outcome for each client.

Investment Advice is offered through Belpointe Asset Management, LLC, 500 Damonte Ranch Parkway, Building 700, Unit 700, Reno, NV 89521. Additional information about Belpointe Asset Management is available on the SEC’s website at www.adviserinfo.sec.gov. It is important to read our disclosures available at: https://belpointeasset.com/disclosures

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