



# Investment Example

		Opportunity Zone	No Incentive
Original Capital Gain		1,000,000	1,000,000
Capital Gains Tax Due Now	23.80%		238,000
<b>Balance</b>		1,000,000	762,000
<b>Equity Investment</b>		900,000	762,000
<b>7 Year Bond Purchase</b>		100,000	
Year 1			
Preferred ROI	7%	63,000	53,340
Bond Rate	2.81%	2,810	
Year 2			
Preferred ROI	7%	63,000	53,340
Bond Rate	2.81%	2,810	
Year 3			
Preferred ROI	7%	63,000	53,340
Bond Rate	2.81%	2,810	
Year 4			
Preferred ROI	7%	63,000	53,340
Bond Rate	2.81%	2,810	
Year 5			
Preferred ROI	7%	63,000	53,340
Bond Rate	2.81%	2,810	

		Opportunity Zone	No Incentive
Year 6			
Preferred ROI	7%	63,000	53,340
Bond Rate	2.81%	2,810	
Year 7			
Preferred ROI	7%	63,000	53,340
Bond Rate	2.81%	2,810	
<b>Deferred Tax Due</b>	23.80%		202,300
Year 8			
Preferred ROI	7%	63,000	53,340
Year 9			
Preferred ROI	7%	63,000	53,340
Year 10			
Preferred ROI	7%	63,000	53,340
<b>Asset Sale</b>	50%	1,350,000	1,143,000
<b>Capital Gains Tax Due</b>	23.80%	0	90,678
Total Returns		2,797,370	2,347,722
Total Taxes Paid:		202,300	328,678
<b>Difference in Total Returns:</b>		<b>\$449,648</b>	
<b>Difference in Total Taxes Paid:</b>		<b>\$126,378</b>	
<b>Bond Revenue:</b>		<b>\$19,670</b>	
<b>TOTAL BENEFIT OF INVESTING IN OPPORTUNITY ZONE: \$595,696</b>			