

THE MSO STRATEGY

A Management Services Organization



WHY CONSIDER AN MSO?

- The majority of small businesses are significantly overpaying their federal income taxes because they have not updated their financial structures after tax law changes.
- Guardian's system uses tax savings strategies like the MSO to help producers attract small business clients.
- Tax savings can be used as a funding vehicle for insurance premiums to reduce risks and accumulate wealth.

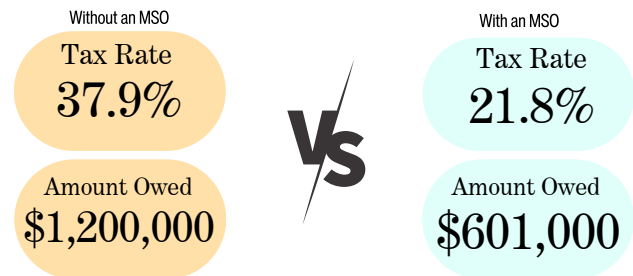
HOW DOES IT WORK?

- Adding an MSO to your enterprise means income received in the MSO's 21% tax environment creates a savings to any pass-through income taxed at 32-37%.

WHAT IS IT?

- A valuable tool to better protect your assets, save on taxes, and utilize those savings to hedge against risks.
- MSOs have been around for decades. They are typically seen in the healthcare industry, but after the Tax Cuts and Jobs Act of 2017 the structure is now advantageous for most business owners.

EXAMPLE



Without an MSO, **\$599,000** is unnecessarily paid in taxes.

WHAT WE SOLVE FOR?



One Central Entity
Protect assets, share resources



Utilize the funds
M&As, succession funding, expansion, business reserves



Take your \$\$\$ Back
Retain the money you are unnecessarily losing to taxes.



Grow Wealth
Deploy funds towards wealth accumulation outside your business



Protect against 2026 tax increases
QBID deduction terminates, margin rates increase, estate tax increases

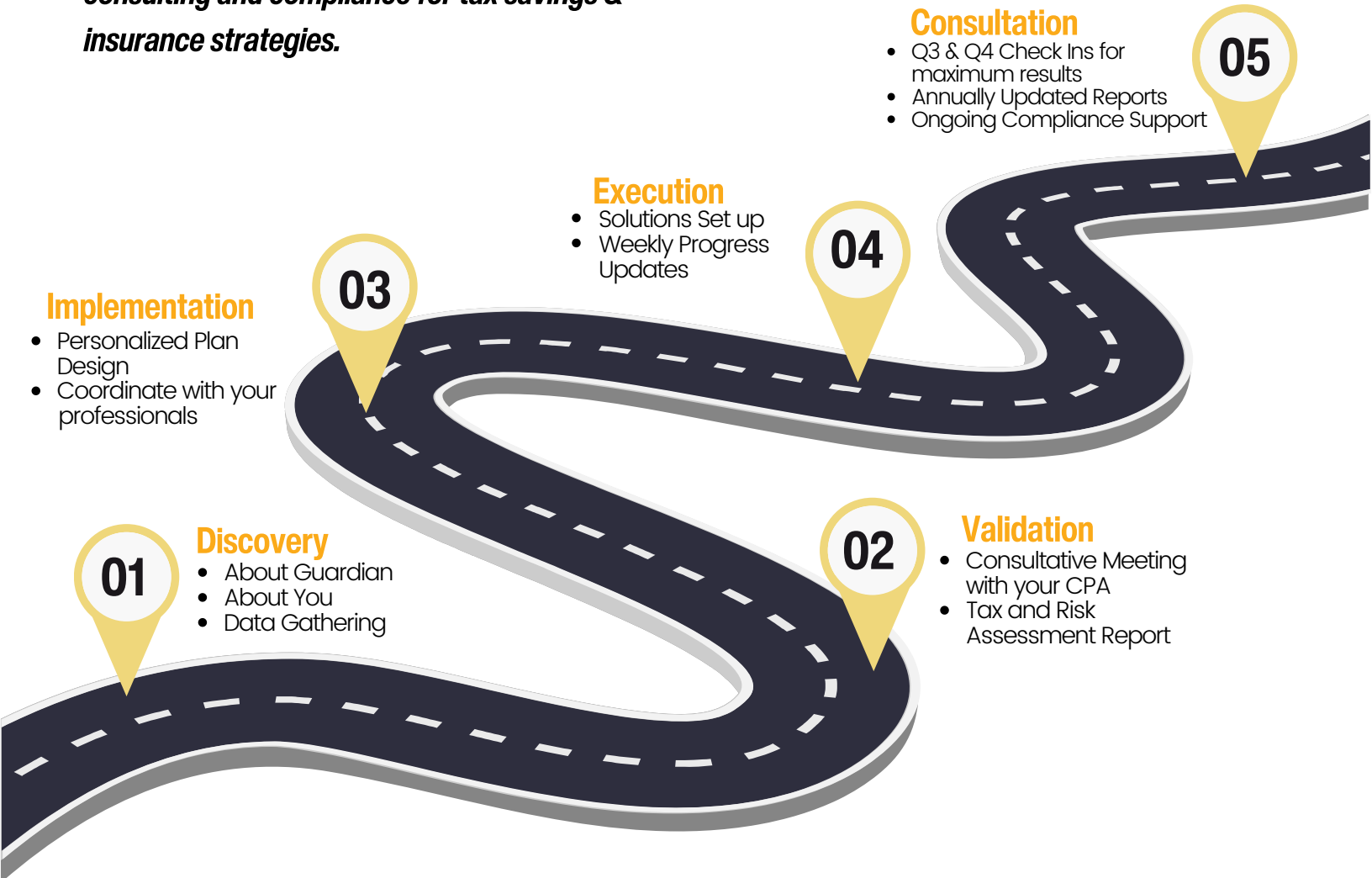
Contact us

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GUARDIAN'S MSO PROGRAM

A proven system that ensures end-to-end support, including validation, execution, and ongoing annual consulting and compliance for tax savings & insurance strategies.



SEE HOW AN MSO COULD OPTIMIZE YOUR STRUCTURE TODAY.

FILL OUT THIS **FORM** FOR A PERSONALIZED MSO PROJECTION.