

# Commercial Investment Networking Meeting

July 18 2023

8:00AM - 9:40AM

*\*3rd Tuesday every month*

In-Person

SRAR Auditorium,

7232 Balboa Blvd. Lake Balboa, CA

## MEASURE ULA THE NEW “MANSION TAX” – A WAY TO AVOID IT?

Housing analysts say Measure ULA’s success at the polls was partly due to its branding as a “mansion tax”. However, many industry experts anticipate much of the revenue generated will instead come from sales of apartment buildings and commercial properties.

Can this tax be avoided? Come hear what a tax attorney has to say.

### MEETING SCHEDULE

8:15 am - Networking and breakfast

8:30 am - Introductions

8:45 am - Brian Linnekens, Esq.

9:15 am - Haves and wants

9:40 am - Meeting adjourns



**Brian Linnekens, Esq.**

*Fidelity Law Group*

Measure ULA is new. Any planning to avoid or mitigate any transfer tax is largely untested. Any planning should involve a tax advisor and/or attorney. REALTORS should not be giving tax advice or endorsing any one source.