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Key Advantages of Using REITs by Funds for Tax-Exempt Investors

The Tax Blueprint: Structuring Funds, Joint Ventures, and REITs

SPEAKERS

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Welcome back to “[The Tax Blueprint: Structuring Funds, Joint Ventures, and REITs](#).” In the second episode of our three-part series, hosts Saba Ashraf, Aresh Homayoun, and Tom Phelan explore the unique advantages real estate funds can offer to tax-exempt investors – including pension plans, university endowments, private foundations, and IRAs.

This episode discusses key strategies for tax-exempt investors to maximize their returns, including the use of REITs as a “blocker” to avoid UBTI, the implications of debt-financed income, and the nuances of the fractions rule.

Stay tuned for upcoming episodes which will cover the advantages of REITs for foreign investors in funds.

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