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Real Deals, Real Savings: Banking CFO Perspectives on Tax Credit Purchases

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Learning Objectives

- Identify how leading financial institutions are strategically timing transactions, mitigating risk, and enhancing after tax returns
- Recognize why tax credit purchases are quickly becoming a go to, repeatable tax strategy for banks



Speakers



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Credit Transferability at a Glance

- IRA permits tax credit transfers of several different types of energy credits
 - Proceeds to seller are tax-free
 - Tax savings (i.e., discount) to buyer are tax-free
- Purchasers can time the transactions around estimated tax payments, extensions, or tax return due dates to enhance IRR
- Robust transfer market has developed since IRA was enacted



Thank you!

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