

# THE CONFIDENT INVESTOR

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**BEYOND THE BASICS:**  
**Advanced Tax Moves**  
**for Your Investment Strategy**



WORKBOOK

# THE EXPERTS



## **Sarah Sullivan** **The Confident Investor**

Sarah Sullivan is a second-generation real estate investor and the visionary founder and CEO of SuGo Capital, a diversified investment firm based in the San Francisco Bay Area. With a background in cybersecurity, analytics, and engineering program management, she brings a data-driven, detail-oriented approach to identifying high-performing investment opportunities.

Under Sarah's leadership, SuGo Capital has grown to manage over \$850 million in acquired assets, including 36 apartment complexes and participation in two oil funds. Originally focused on multifamily real estate syndications, SuGo Capital has expanded to include investments in oil and gas, private equity, and other alternative assets.

Sarah is also a passionate educator and advocate for financial empowerment. She hosts The Confident Investor Series and the Women's Wealth Show, initiatives that have reached over 30,000 investors. Additionally, she offers a "4-Point Strategy Session" to help individuals align their financial goals with suitable investment strategies.

Outside of her professional endeavors, Sarah enjoys aerial arts, rock climbing, and traveling with her husband Theo and their two daughters.



## **Don Pendleton** **Protect Wealth Academy**

Don Pendleton is an expert in the areas of lawsuit protection, tax reduction and estate planning and has co-authored multiple textbooks and articles. Every year he is a featured presenter during numerous seminars and workshops on asset protection related subjects. His books and trainings have helped thousands of business owners, investors, and professionals save millions of dollars. He is one of the nation's top asset protection advisors and has been helping professionals properly structure themselves for lawsuit protection and tax reduction. His knowledge, expertise, and straight-forward teaching style have made him one of the top asset protection speakers in the nation.

**Reflecting on: LLC, corporation or trust for the best tax benefit and asset protection...**

**What structure is the best way for me personally to invest in real estate?**

**What structure is the best way for me personally to invest in oil and gas?**

**What structure is best for me to invest in a debt opportunity?**

**Reflecting on: LLC, corporation or trust for the best tax benefit and asset protection...**

**How should my stock investment be held?**

**How do I put a legacy plan in place so everything passes to my heirs probate free?**

**The website where I can find investments to plug into the Return on Investment Calculator:**

 <https://>