

# Capital Concepts, Inc

Capital Concepts, Inc (CCI) the 1<sup>st</sup> of the 5Cees Companies was established in 1976. It was originally a consulting firm for Insurance, tax and legal advisors under the name of Unified Planning Services, Inc and the name was changed to CCI in the 1980's.

CCI is a approved provider of continued educations (CE) tax schools called "Tax Strategies" for Accountants, Attorneys (some states), Realtors and Insurance and Financial Advisors.

In the early years they taught the four North West States practitioners estate and financial planning on such benefits as Living Trusts and the IRC 105 plan which have become common names in the legal and tax community today. In 2000 they added classes for Realtors and Insurance and financial advisors a school designed to help them to attain advanced methods of how to help them grow their practice by learning advanced Estate and Financial planning methods.



In 1999 when the stock market boom erupted and then the real estate market in 2002 CCI added to their CE schools specialty tax strategies that allows clients to sell a highly appreciated asset and reduce or avoid 5 levels of taxes. The students found them such great benefits they referred 100's of new clients to CCI to help them show their client how to reduce their tax liability. Stock brokers, Realtors, and financial advisors once they learned about them made mega of new sales thanks to these programs.

CCI has been advisors for nonprofit organizations from Universities to churches helping them acquire new donors by learning how to accept Non-cash gifts. In 2011 CCI did three workshops in Spokane, WA educating many organizations how and it has been successful for the ones that followed through with their training.

CCI takes great pride as a team player and is ready to help you planning for your clients needs and solving and executing a plan that is the best fit for them.

You can reach CCI by e-mailing the administrative office at [capital@5cees.com](mailto:capital@5cees.com) or 1-800-949-1485 (hours 10: AM-3: PM, M-F).