DFY REAL ESTATE
INVESTMENT SOLUTIONS

A DFY Signature Strategy | Operating partner: A Real Home Away

REAL ESTATE TAX STRATEGIES WEALTH FREEDOM

A BRIGHTER FINANCIAL TOMORROW.

SURE GUIDE –

TAX-SMART REAL ESTATE

A structured approach to pursuing meaningful tax reduction through direct real estate ownership.

What is the STR Exception?

Under IRS guidelines, rental real estate is generally treated as a passive activity. However, an exception may apply to short-term rentals when both of the following are true.

AVERAGE GUEST STAY IS 7 DAYS OR LESS

(or 30 days or less with substantial services).

OWNER MATERIALLY PARTICIPATES IN OPERATIONS

(100+ hours and more hours than any other individual providing services).

When those conditions are met, the activity may be treated as non-passive, potentially allowing losses to offset active income.

THIS DISTINCTION IS WHAT CREATES THE OPPORTUNITY.

Who This Is Designed For

- High-income households seeking meaningful tax reduction.
- Investors with approximately $150,000+ liquid investable capital.
- Buyers who want professional support rather than a DIY strategy.

A PROVEN PARTNERSHIP

DFY created the Sure Guide strategy and acquisition process. A Real Home Away serves as the operating partner managing the property and day-to-day execution.

STRATEGY. EXECUTION. LASTING VALUE.

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★★★★★

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SURE GUIDE – TAX-SMART REAL ESTATE

How Is the Tax Benefit Created?

The primary tax benefit is driven by accelerated depreciation, typically made possible through a cost segregation study.

A cost segregation study identifies components of the property that may be depreciated over shorter timeframes, allowing a larger portion of the asset's value to be recognized earlier.

When paired with current bonus depreciation rules, this can create significant paper losses in year one, which may be used to offset certain active income—subject to individual circumstances and CPA review.

- **W2 Income**
- **Business Income**
- **Other Active Earnings**

For the right client profile, this can represent a meaningful and immediate reduction in taxable income.

THE PROCESS

REAL ASSETS. REAL STRATEGY. REAL ADVANTAGE.

PROPERTY
Acquire income-producing real estate with a long-term focus.

COST SEG
Identify and reclassify property components for shorter depreciation timeframes.

DEPRECIATION
Accelerated depreciation creates significant paper losses, especially in year one.

OFFSET TAXES
Use losses to potentially offset W2 income, business income, or other active earnings (subject to IRS rules).

This is still direct real estate ownership—with potential income, long-term appreciation, financing leverage, and tax strategy working together.

REAL OWNERSHIP. MULTIPLE BENEFITS. A BRIGHTER TOMORROW.

Sure Guide is a DFY strategy. A Real Home Away supports operational execution.

PEOPLE | PROPERTIES | POSSIBILITIES

Illustrative only. Tax benefits are not guaranteed and depend on property characteristics, holding structure, participation, bonus depreciation rules, and individual tax circumstances. Review all decisions with a qualified CPA or tax professional.

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THE DFY-LED STR TO MTR MODEL

How the Sure Guide Strategy Works

Sure Guide is designed to help qualified buyers pursue the short-term rental exception through a structured, supported process—then transition the property into a professionally managed mid-term rental hold.

The strategy, without the second job.

THE 6-STEP PROCESS — FROM ACQUISITION TO LONG-TERM WEALTH

1. Acquire a qualifying property through DFY →
2. Launch as a short-term rental →
3. Complete structured owner participation →
4. Track 100+ hours and documentation →
5. Complete cost seg + CPA coordination →
6. Transition to a professionally managed MTR hold

Who Does What?

DFY LEADS

- Strategy fit and investor qualification
- Property sourcing and acquisition
- Financing and project coordination
- Participation framework and guidance
- Ongoing advisory support

A REAL HOME AWAY MANAGES

- Launch planning and setup
- Listing and guest operations
- Pricing and booking support
- Owner-action coordination
- Documentation support
- Day-to-day property management

BUILT FOR SIMPLICITY

The participation tracker helps organize eligible owner activities, document time, and keep records ready to share with your CPA or tax professional.

ORGANIZED TODAY. GREATER TOMORROW.

Best Fit

- High-income households seeking meaningful tax reduction.
- Approximately $150,000+ liquid investable capital.
- A desire for professional support rather than DIY execution.

Next Steps

- Schedule your qualification call
- Review fit with your CPA
- Reserve an available opening

LIMITED 2026 CAPACITY; ADDITIONAL QUALIFIED CLIENTS MAY BE PLACED ON THE 2027 WAITLIST.