



CAPABILITY STATEMENT

CAYMANCAPITAL.NET/ABOUT/

Cayman Capital, Inc. is a Registered Investment Advisor and Business Consultant, dedicated to maximizing financial outcomes through strategic Retirement and Supplemental Income Planning and other customized wealth income strategies. Dennis Noss is also an IRS Enrolled Agent. We specialize in crafting tax-efficient solutions for assets under management, with a unique focus on helping business owners reduce or eliminate taxes and maximize income on both business income and assets. Our results-driven approach delivers customized, proactive planning designed to optimize long-term financial success and secure a tax-advantaged future.



CORE COMPETENCIES

Asset Management Consulting

- ◆ Expertise in developing and implementing comprehensive asset management strategies tailored to client needs, ensuring optimal financial performance and risk management

Retirement Planning

- ◆ Specialized retirement planning solutions designed to secure long-term financial stability, with a focus on tax-efficient strategies and risk mitigation

Supplemental Income Planning

- ◆ Customized supplemental income strategies aimed at enhancing financial security, focusing on maximizing income streams while minimizing tax exposure



PRIMARY NAICS & PSC CODES

- 523940** - Portfolio Management and Investment Advice
- 524210** - Insurance Agencies and Brokerages
- 531210** - Offices of Real Estate Agents and Brokers
- R402** - Support- Professional: Real Estate Brokerage
- R499** - Support- Professional: Other
- R710** - Support- Management: Financial

COMPANY SNAPSHOT

CAGE: 9Z5U1 **UEI:** XDXEZM15MWB8

Gov. Business POC: Dennis Noss

Phone: (650) 477-4370

E-Mail: dennis@caymancapital.net

Address: 3561 Homestead Rd., Ste. 503
Santa Clara, CA 95051

Work Area: Nationwide

DIFFERENTIATORS

- ◆ **Client-Customized Structured Products:** Tailored strategies that maximize income while minimizing or eliminating taxes on retirement and supplemental income.
- ◆ **Tax Recapture for Business Entities:** Customized portfolios that may eliminate capital gains on investments, sale of business, stock trades and real estate without relying on 1031 exchanges.
- ◆ **Customized Structured Income Portfolios:** Tax-efficient income portfolios designed for maximum retention.
- ◆ **Tax-Efficient Investment Strategies:** Strategies focused on reducing tax burdens to enhance returns.
- ◆ **Comprehensive Retirement Planning:** Integrated retirement solutions optimized for tax efficiency and long-term growth.

DENNIS NOSS
GOV BUSINESS POC

(650) 477-4370

DENNIS@CAYMANCAPITAL.NET

3561 HOMESTEAD RD., STE. 503, SANTA CLARA, CA 95051