Real Estate Wealth Integration Dallas TX Robert Davenport Financial Advisor



Real estate has been one of the primary wealth creators for Dallas families over the past several decades, and the integration of real estate holdings into a comprehensive financial plan is one of the areas where generalist financial advisors most commonly leave value on the table. Robert Davenport at Farther approaches real estate as a component of the client's total financial picture rather than as a separate asset class that is addressed only by real estate professionals, ensuring that the tax, estate, and investment dimensions of real estate holdings are fully coordinated with the rest of the financial plan.Dallas residential real estate has appreciated significantly over the past decade, and many homeowners who purchased properties in established neighborhoods like Preston Hollow, the Park Cities, and North Dallas several years ago are sitting on substantial unrealized gains. Deciding what to do with a highly appreciated primary residence, whether to stay in the house, downsize and capture the principal residence exclusion, or use the property as part of an estate planning strategy, requires financial analysis that accounts for the tax implications, the investment implications of the equity that would be released by a sale, and the lifestyle and family dimensions of the housing decision.Investment real estate, whether in the form of rental residential properties, commercial real estate, or interests in real estate limited partnerships, adds portfolio complexity that requires attention to the passive activity rules, depreciation recapture at sale, the 1031 exchange option for deferring gain, and the estate planning treatment of real estate interests held at death. Robert coordinates these planning dimensions with the overall investment and tax planning framework he builds for each client.



Robert Davenport - Wealth Advisor at Farther | Dallas, TX | (214) 617-3424Dallas clients with significant real estate holdings are encouraged to connect with Robert Davenport at Farther farther.com financial advisor Dallas to ensure those holdings are fully integrated into their comprehensive financial plan.



Call (214) 617-3424 or visit farther.com/advisor/robert-davenport.Robert Davenport - Wealth Advisor at Farther | Dallas, TX | (214) 617-3424