

## Steve Rothschild Joins The Strategic Group as a Partner

Atlanta, G.A., January 31, 2018 - The Strategic Group, a boutique investment firm that focuses primarily on investment strategies that also provide tax benefits as a source of returns, today announced Steve Rothschild will join as a Partner and expand the Firm's state and federal tax credit business.

"We are excited to have Steve join our Firm. He brings with him a wealth of knowledge, experience, and relationships in state and federal tax credits, and will help us greatly broaden our lines of business," said James Freeman, Co-Managing Partner of the Strategic Group. "Our firm is quickly becoming a trusted resource for tax consultants and family offices for all of their tax-related needs. Steve joining our Firm is another step in that direction."

Mr. Rothschild will focus on state and federal tax credit offerings, including film, historic rehabilitation, and LIHTC. Mr. Rothschild also brings with him vast experience in real estate development, as a former manager of a +\$200 million private real estate portfolio. Prior work and board experience includes, Premisys Real Estate Services, and he was the founding member of Preferred Real Estate Funds as well as State Tax Credit Exchange in Atlanta. He is an active member of Children's Healthcare of Atlanta, the Association for Corporate Growth, and CCIM. Mr. Rothschild is also on the Board of Governors of the Buckhead Club and sits on advisory boards of various companies.

"I am excited to partner with The Strategic Group. The Firm's combination of investment management and a tax mitigation strategies is well positioned to greatly assist our clients," said Mr. Rothschild. "The state and federal tax credits can help round out our offerings and allows us to become a one-stop solution for many high-net worth individuals, corporations, and family offices."

### About The Strategic Group

The Strategic Group is a boutique investment firm that focuses primarily on investment strategies that also provide tax benefits as a source of returns. We work closely with high net worth investors, family offices and their trusted advisors, as well as corporations, and banks. We have four primary lines of business that include:

- Opportunity Zones: Target investments in real estate and other private equity opportunities in designated "Opportunity Zones" that can mitigate the taxation of capital gains and all future appreciation may grow tax free
- Conservation: Consults and structures "green, sustainable, and socially responsible" conservation investments with the potential to mitigate tax liabilities while generating other private equity returns
- 1031 Qualified Intermediary: Consults and serves as a qualified intermediary for 1031 tax-free exchanges, including strategies resulting from partnerships, lease buy-backs, and other complex structures
- Federal & State Tax Credits: Consults, invests, and brokers transferable Federal and State tax credits such as film, low-income housing, historic rehabilitation, renewable energy, and various state and federal programs that mitigate tax liabilities

This is not an offering to subscribe for units in any fund and is intended for informational purposes only.

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