

# **Bond Case Briefs**

*Municipal Finance Law Since 1971*

---

## **Advisors Must Weigh Benefits and Real Dangers Before Offering This Hot New Tax Play.**

### KEY POINTS

- The Tax Cuts and Jobs Act of 2017 introduced opportunity funds. They invest in economically distressed areas and offer a tax break for participants.
- Invest capital gains into a qualified opportunity zone fund and hold it for at least five years to get a tax advantage.
- Robert W. Baird & Co. will soon offer access to such a fund on its platform, but investors must be qualified purchasers with at least \$5 million in investible net worth.

[Continue reading.](#)

CNBC

by Darla Mercado

MAY 28 2019 8:44 AM EDT

Copyright © 2024 Bond Case Briefs | [bondcasebriefs.com](https://bondcasebriefs.com)