

CLIENT SUCCESS

Case Study #2

Tax Year: 2024

Filing Status: Married w/ 3 Dependents

Occupation: Network Technology, Rental Property Owner

Tax Advisory Overview

Before Implementing Tax Strategies	After Implementing Tax Strategies
AGI = \$415,500	AGI = \$85,300
Total Taxes Due: \$90,161	Total Taxes Due: -\$1,385 (Refund)

*Tax Savings Are A Result Of Applied Deductions & Effective Tax Rate

Deductions by Strategy

Applied Tax Strategy	Deduction Amount
Pass Through Entity (PTET)	\$46,500
Adding Spouse & Children to Payroll	\$41,000
Health Savings Account	\$8,300
Accountable Plan Reimbursement	\$20,000
Retirement Plan Implementation	\$176,400
Backdoor Roth IRA Husband & Spouse	\$16,000
Cost Segregation on Rental Property	\$96,000
Augusta Rule	\$3,000

Total Tax Savings in Year 1 = \$91,546+