

CLIENT SUCCESS

Case Study #3

Tax Year: 2024

Filing Status: Single

Occupation: Construction Business Owner

Tax Advisory Overview

Before Implementing Tax Strategies	After Implementing Tax Strategies
AGI = \$207,400	AGI = \$16,250
Total Taxes Due: \$31,652	Total Taxes Due: -\$13,430 (Refund)

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

Deductions by Strategy

Applied Tax Strategy	Deduction Amount
Oil & Gas Investment	\$90,000
Health Savings Account	\$4,150
Accountable Plan Reimbursement	\$5,000
Bonus Depreciation	\$17,000
Backdoor Roth IRA	\$7,000

Total Tax Savings in Year 1 = \$46,390+