



Tax Savings Analysis for 2024

Brian F.

2024 Tax Planning

Opportunities Identified to Reduce Your Annual Tax

Personal - Other	\$1,672
Business - Other	\$19,747
Retirement	\$279,465
Itemized Ded	\$10,075
Adjustment to Income	\$1,008

Estimated Year 1 Tax Savings	\$311,967
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Year 2 & Forward Savings

Personal - Other	\$1,672
Business - Other	\$19,747
Retirement	\$279,465
Itemized Ded	\$10,075
Adjustment to Income	\$1,008

Total Estimated Year 2 & Forward Tax Savings (low/conservative)	\$311,967
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Your investment in Taylor Proactive Team:

Strategy Investment	\$135,000
Implementation Fee	\$35,000

Net Deductible Increase in Investment to us:	\$170,000
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After tax investment:	\$110,500
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After Tax Yearly Investment to us after Y1:	\$110,500
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Projected Gain on Your Investment by End of Year 1:	\$201,467
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Return on investment:	182%
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Projected Net Tax Savings for Year 2 & Forward:	\$1,813,201
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Total Tax Savings Over the Next 10 Years	\$2,014,667
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