



Tax Savings Analysis for 2024

David G.

2024 Tax Plan

Opportunities Identified to Reduce Your Annual Tax

Business - Other	\$150,000
Estimated Year 1 Tax Savings	\$150,000

Year 2 & Forward Savings

Business - Other	\$150,000
Total Estimated Year 2 & Forward Tax Savings (low/conservative)	\$150,000

Your investment in Taylor Proactive Team:

Credit Purchase	\$90,000
Planning Fee	\$15,000
Net Deductible Increase in Investment to us:	\$105,000

After tax investment:	\$99,750
After Tax Yearly Investment to us after Y1:	\$99,750

Projected Gain on Your Investment by End of Year 1:	\$50,250
Return on investment:	50%
Projected Net Tax Savings for Year 2 & Forward:	\$452,250
Total Tax Savings Over the Next 10 Years	\$502,500

Disclaimer of Professional Advice. The information provided through the Products is not and shall not be construed as tax, accounting, legal, regulatory or other professional advice or sufficient to satisfy any tax, accounting, legal, regulatory or other professional requirements. Customer and/or each User should consult tax, accounting, legal, regulatory or other professional advisor(s) for advice. None of the Products nor any related services or any portion thereof shall constitute or be construed as (a) a solicitation, offer, opinion or recommendation by TaxPlanIQ its affiliates or any supplier, for any transaction in any financial instrument, including but not limited to securities or (b) forming an attorney-client relationship.