



Tax Savings Analysis for 2024

Kelly J.

SOP Stacking

Opportunities Identified to Reduce Your Annual Tax

Business - Other	\$100,000
Personal investment	\$389,134
Estimated Year 1 Tax Savings	\$489,134

Year 2 & Forward Savings

Personal investment	\$389,134
Total Estimated Year 2 & Forward Tax Savings (low/conservative)	\$389,134

Your investment in Taylor Proactive Team:

2024 Tax Planning Due Diligence & Implementation - to Taylor Proactive Team (tax deductible)	\$31,632
Strategy Implementation Cost	\$212,926
Tax Credit Implementation Cost	\$65,000
Net Deductible Increase in Investment to us:	\$309,558

After tax investment:	\$309,558
After Tax Yearly Investment to us after Y1:	\$212,926

Projected Gain on Your Investment by End of Year 1:	\$179,576
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Return on investment:	58%
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Projected Net Tax Savings for Year 2 & Forward:	\$1,585,872

Total Tax Savings Over the Next 10 Years	\$1,765,448
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