Tax Savings Analysis for 2024

Jackson P.

SOP

Opportunities Identified to Reduce Your Annual Tax	
Adjustment to Income	$0
Personal investment	$740,000
Business - Other	$158,126
Retirement	$0
Itemized Ded	$163,769
Income Shifting	$0
Estimated Year 1 Tax Savings	$1,061,895
Year 2 & Forward Savings	
Personal investment	$740,000
Retirement	$0
Itemized Ded	$163,769
Income Shifting	$0
Total Estimated Year 2 & Forward Tax Savings (low/conservative)	$903,769
Your investment in Taylor Proactive Team:	
LAD - Implementation Cost	$102,304
SOP - Implementation Cost	$400,000
STTC - Implementation Cost	$102,782
2024 Tax Planning Due Diligence & Implementation - to Taylor Proactive Team	$49,680
Net Deductible Increase in Investment to us:	$654,766
After tax investment:	$654,766
After Tax Yearly Investment to us after Y1:	$502,304
Projected Gain on Your Investment by End of Year 1:	$407,129
Return on investment:	62%
Projected Net Tax Savings for Year 2 & Forward:	$3,613,185
Total Tax Savings Over the Next 10 Years	$4,020,314