



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**

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