



Tax Savings Analysis for 2024

Jerry & Claire F.

Initial Tax Plan

Opportunities Identified to Reduce Your Annual Tax

Business - Other	\$100,000
Personal investment	\$0
Adjustment to Income	\$0
Itemized Ded	\$158,039

Estimated Year 1 Tax Savings	\$258,039
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Year 2 & Forward Savings

Personal investment	\$0
Adjustment to Income	\$0
Itemized Ded	\$158,039

Total Estimated Year 2 & Forward Tax Savings (low/conservative)	\$158,039
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Your investment in Taylor Proactive Team:

Leveraged Charitable - Implementation Cost	\$103,207
Tax Credit - Implementation Cost	\$65,000
2024 Tax Planning Due Diligence & Implementation - to Taylor Proactive Team	\$14,972

Net Deductible Increase in Investment to us:	\$183,179
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After tax investment:	\$179,137
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After Tax Yearly Investment to us after Y1:	\$103,207
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Projected Gain on Your Investment by End of Year 1:	\$78,902
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Return on investment:	44%
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Projected Net Tax Savings for Year 2 & Forward:	\$493,488
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Total Tax Savings Over the Next 10 Years	\$572,390
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