



## KDA CASE STUDY 1. (BUSINESS OWNER HOUSEHOLD)

"This family was running a successful business, but every year tax season felt like a punishment. They were cutting large checks to the IRS without any real strategy. After coming to KDA, we restructured their income, applied advanced business deductions, and leveraged qualified business income strategies. Instead of owing over \$100K, they walked away with only \$6,638 due — a \$95,171 turnaround in their favor."

**Tax Year:** 2023

**Filing Status:** Married Filing Jointly

**Occupations:** Business Owner, Professional Spouse

### Overview

	Before Implementing Tax Strategies	After Implementing Tax Strategies
AGI	\$1,250,308	\$1,142,290
Total Taxes Due	\$101,809	\$6,638

# Deductions by Tax Strategy

Tax Strategy	Deduction Amount
Qualified Business Income Deduction (QBID)	\$175,706
Standard / Itemized Deductions	\$25,900
Strategic Adjustments & Planning	\$282,000+ savings through reallocation, credits, and deductions
Total Tax Savings = \$66,637	



**Program Investment:** \$24,000  
**Return on Investment:** Nearly 3X in the first year alone.