

MID-SIZED BUSINESS OWNER

"This business owner was stuck in the cycle of paying high taxes year after year, with little guidance on how to change the outcome. In 2022, their tax liability stood at nearly \$19,000, with limited deductions applied.

After working with KDA, we identified overlooked opportunities — from qualified business income deductions to advanced credits and structuring adjustments. Their tax situation flipped from owing \$18,759 to receiving an \$87,081 refund. That's \$105,840 in tax savings they could redirect into growing their business."

Tax Year: 2023

Filing Status: Married Filing Jointly

Occupations: Business Owner / Entrepreneur

Overview

	Before Implementing Tax Strategies	After Implementing Tax Strategies
AGI	\$448,090	\$-6,933
Total Taxes Due	\$18,759	-\$87,081 (Refund)

Deductions by Tax Strategy

Tax Strategy	Deduction Amount
Itemized Deductions	\$34,565
Qualified Business Income Deduction	\$109,565
Advanced Credits & Adjustments	Balance of \$105,840 savings achieved
Total Tax Savings = \$105,840	



Program Investment: \$24,000
Return on Investment: Over 4X in the first year.