

MEDICAL PROFESSIONAL + ENGINEER

"This couple thought being high W-2 earners meant they were stuck paying sky-high taxes. Their old accountant told them there wasn't much they could do outside standard deductions. KDA showed them how to apply strategic planning tools usually reserved for business owners. The result? Their taxable income dropped by more than \$400K, and their tax bill fell from \$99,891 to just \$33,254 — saving them \$66,637 in the first year."

Tax Year: 2022

Filing Status: Married Filing Jointly

Occupations: Medical Professional, Engineer

Overview

	Before Implementing Tax Strategies	After Implementing Tax Strategies
AGI	\$617,430	\$201,606
Total Taxes Due	\$99,891	\$33,254

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.