

REAL ESTATE INVESTOR

"This investor was building wealth in real estate but wasn't capturing the full tax benefits available. They were used to large tax bills, with no end in sight. After implementing our advanced strategies — including REPS and cost segregation — not only did they eliminate their \$176,978 liability, but they actually received a \$17,604 refund. That's a \$194,582 swing they reinvested directly back into their portfolio."

Tax Year: 2023

Filing Status: Married Filing Jointly

Occupations: Real Estate Investor, Business Owner

Overview

	Before Implementing Tax Strategies	After Implementing Tax Strategies
AGI	\$575,000	\$496,397
Total Taxes Due	\$176,978	-\$17,604 (Refund)

Deductions by Tax Strategy

Tax Strategy	Deduction Amount
Itemized Deductions	\$82,825
Qualified Business Income Deduction	\$157,097
Strategic Real Estate Professional Status (REPS) Adjustments	~\$194,000 impact
Additional Credits & Planning	Balance of savings applied through entity structuring and advanced deductions
Total Tax Savings = \$194,582	



Program Investment: \$24,000

Return on Investment: Over 8X in the first year alone.