

ULTRA-HIGH-NET-WORTH ENTREPRENEUR

"This client was earning in the multi-millions, but their tax bills were staggering — over \$2.1 million in federal liability alone. They felt trapped, thinking there was no way to reduce taxes at their level. When they partnered with KDA, we completely restructured their tax strategy, leveraging advanced deductions, entity planning, and income reallocation. The result was stunning: their liability flipped from owing \$2,193,061 to a \$552,799 refund — a \$2,745,860 swing in their favor."

Tax Year: 2022

Filing Status: Married Filing Jointly

Occupations: High-Net-Worth Entrepreneur / Investor

Overview

	Before Implementing Tax Strategies	After Implementing Tax Strategies
AGI	\$7,086,832	\$4,003,411
Total Taxes Due	\$2,193,061	-\$552,799 (Refund)

Deductions by Tax Strategy

Tax Strategy	Deduction Amount
Qualified Business Income Deduction	\$6,078,932
Itemized Deductions	\$1,010,000
Advanced Entity Structuring & Planning	Balance of \$2,745,860 savings achieved
Total Tax Savings = \$2,745,860	



Program Investment: \$24,000

Return on Investment: Over 100X in the first year.