

REAL ESTATE POWERHOUSE INVESTOR

"This client was rapidly expanding their real estate portfolio with multiple properties across the country. Despite their growth, they were blindsided by massive tax bills — over \$1.29 million due in a single year. They felt like their success was being drained by the IRS. After implementing KDA's strategies — including multiple cost segregation studies, home office deductions, a defined benefit plan, and advanced structuring — their tax bill didn't just shrink. It flipped. Instead of owing \$1,292,824, they received a \$356,187 refund. That's \$1,649,011 back in their pocket to reinvest in even more properties."

Tax Year: 2022

Filing Status: Married Filing Jointly

Occupations: Real Estate Investor / Entrepreneur

Overview

	Before Implementing Tax Strategies	After Implementing Tax Strategies
AGI	\$4,121,188	\$-327,812
Total Taxes Due	\$1,292,824	-\$356,187 (Refund)

Deductions by Tax Strategy

Tax Strategy	Deduction Amount
Cost Segregation (Multiple Properties)	\$889,000+ (combined impact)
Defined Benefit Plan	\$610,000
Home Office Deduction	\$6,000
Advanced Real Estate Structuring & Planning	Balance of \$1,649,011 savings achieved
Total Tax Savings = \$1,649,011	



Program Investment: \$24,000

Return on Investment: Nearly 70X in the first year alone.