THE KDA FIRM BOOK

Protecting taxpayers.

Building what comes next.

Since 1993, the Dennis family has helped business owners, professionals, investors, and families make more informed tax decisions—then carry the work through.

1993	30+	100+
FOUNDED	YEARS OF SERVICE	FIVE-STAR REVIEWS

A DIFFERENT KIND OF TAX FIRM

More than a tax return.

A firm built to help you keep more of what you earn.

KDA is a family-led tax strategy and advisory firm built around a simple idea: tax work should help move your life, business, and wealth forward—not merely record what already happened.

Our work brings proactive tax planning, preparation, specialty services, and year-round support into one relationship. We evaluate the opportunity, coordinate the work, and help carry the right strategy through to the tax return.

WHAT CLIENTS WANT

To see the difference in what stays with them.

Tax outcomes depend on a client's facts, income, structure, records, and timely implementation.

"Tax strategy only matters when it is carried through."

For clients who have outgrown a once-a-year tax relationship, KDA offers a more coordinated path.

THE KDA DIFFERENCE

Most firms sell you a strategy.

We help you keep more of what you earn.

Tax planning is not a trophy, a PDF, or a conversation that ends when the meeting is over. The point is to pursue a better, legally compliant outcome—one that can be reflected in the work that reaches your return.

THE OUTCOME

Less of your money unnecessarily leaving your account.

KDA pursues legally available opportunities based on each client's facts and circumstances. Results vary.

HOW KDA WORKS

From tax opportunity to tax return.

A clear process helps make proactive tax work useful, coordinated, and accountable.

STEP 1 | UNDERSTAND

We begin with the full picture: income, entities, investments, records, goals, and the friction points creating unnecessary tax exposure.

STEP 2 | ANALYZE

KDA identifies legally available planning opportunities and determines which ones fit the client's unique circumstances.

STEP 3 | COORDINATE

The right strategy may require actions across advisory, bookkeeping, entity, payroll, specialty, or return-preparation work.

STEP 4 | CARRY THROUGH

The work is brought forward into the tax-preparation process so implementation is not left as an afterthought.

THE KDA DIFFERENCE

The value is not just the idea. It is the work required to bring the idea to life.

THE DENNIS FAMILY STORY

A firm shaped by determination, service, and family.

KDA began with Karla Dennis's belief that tax knowledge should create greater opportunity for everyday Americans. Raised in Compton, Karla pursued accounting and a Master's in Taxation, then built a firm rooted in protection, integrity, and action.

Over time, the firm became a family business. Kenneth and Karlton joined the mission; subsequent generations and a growing professional team expanded KDA from a local practice into a national tax strategy firm.

Source: KDA's published Dennis Family story. Leadership titles in this book follow KDA's current internal direction and should be confirmed before final public release.

> **"Strengthening and empowering our community is a family tradition."**

The legacy continues—with a team built for what is next.

Karla Dennis FOUNDER & CHIEF TAX OFFICER

Karla's leadership established the firm's standard: use tax expertise to protect taxpayers, build clarity, and help clients make decisions they can stand behind.

Kenneth Dennis CHIEF EXECUTIVE OFFICER

Kenneth leads the next chapter of KDA's growth—bringing together strategy, operational accountability, education, and client experience to expand how taxpayers access proactive help.

A Family-Led Future

Kameron Dennis, Karlton Dennis, Karrington Dennis, and KDA's broader tax, client-service, and operational teams continue the family tradition of helping clients move from uncertainty to coordinated action.

WHO WE SERVE

When your tax life becomes more complex, a more complete relationship matters.

Business Owners

Growing income, entity choices, payroll, operations, and evolving goals deserve more than an April-only conversation.

Real Estate Investors

Portfolio activity, depreciation, cost segregation, entity coordination, and timing can create both complexity and opportunity.

High-Income Professionals

When compensation rises, planning becomes more valuable—but only when it is grounded in the facts.

Self-Employed & 1099 Earners

Business income and self-employment tax can call for a clearer structure, disciplined records, and proactive decisions.

Medical Professionals

A demanding career and substantial income can create a tax life that benefits from coordinated, specialist support.

Investors, Creatives & Families

KDA supports clients whose income sources, assets, goals, and family decisions do not fit a one-size-fits-all approach.

WHAT KDA CAN BRING TO THE TABLE

A broader tax relationship, built around your goals.

Services are coordinated around the client; not every service is needed for every client.

Strategic Tax Planning

Year-round, individualized analysis designed to identify and implement legally available tax-planning opportunities.

Tax Preparation & Filing

Individual, family, business, corporate, partnership, S corporation, and real-estate return preparation.

Bookkeeping & Payroll

Ongoing operational support that helps make tax reporting clearer and business information more usable.

Entity Structure & Formation

Entity-focused support for clients whose business decisions, ownership, or growth require closer attention.

Cost Segregation & Real Estate

Specialist support for eligible real-estate investors navigating depreciation and portfolio-specific considerations.

Audit Representation & Advisory

Support for tax matters that require technical preparation, documentation, and an experienced advocate.

WHAT TO LOOK FOR IN A TAX FIRM

Not every tax relationship is designed for the same job.

The right firm should be clear about what it will own, what it will coordinate, and what will actually reach the return.

Questions worth asking

Will this firm only prepare the return—or will it help assess tax opportunities before filing?

If a strategy is recommended, who is responsible for moving it toward implementation?

Does the firm have the relevant specialists, or a process for coordinating the work?

Will the people advising you understand the numbers that ultimately go onto the return?

THE KDA ANSWER

KDA is built to bring strategy and preparation closer together.

We begin with your circumstances, identify the right opportunities, coordinate the work, and help carry implementation into the tax-preparation process. That is how we pursue a result you can recognize in what you keep.

PUBLISHED KDA CLIENT STORY

A business-owner household needed more than another filing.

In a published 2023 KDA case study, a married business-owner household had been making annual tax payments above $100,000 without a clear forward-looking plan. KDA evaluated the structure, applied advanced business deductions, and leveraged qualified business income strategies.

BEFORE IMPLEMENTING STRATEGIES

$101,809 Total taxes due

AFTER IMPLEMENTATION

$6,638 Total taxes due

$95,171 published turnaround in their favor.

Published KDA Case Study 1: Business Owner Household. Individual facts, income, records, timing, legal eligibility, and implementation affect outcomes. Results vary and are not guaranteed.

MORE PUBLISHED KDA CLIENT RESULTS

The tax situation is different. The need for accountable work is not.

Real Estate Investor

A KDA-published case study describes an investor who had been paying large tax bills before KDA helped identify applicable real-estate tax benefits and planning opportunities.

$194,582 Published savings figure • Case Study 3

High-Income W-2 Couple

A published KDA case story shows a couple who believed W-2 income left no room for planning and later pursued a more proactive strategy.

$66,637 Published savings figure • Case Study 2

Why show the numbers?

Because the client's end result is not a binder, a webinar, or a recommendation. It is the opportunity to pursue a legally compliant outcome that has a meaningful effect on what they keep.

All figures are drawn from KDA's published Case Studies page. They are client-specific examples, not typical outcomes or a promise of results.

WHAT A KDA RELATIONSHIP IS BUILT TO FEEL LIKE

Clearer. More coordinated. More intentional.

Seen

Your tax life is bigger than a form. The work starts with a fuller understanding of your income, goals, entities, assets, and operating reality.

Guided

You should understand what is being considered, why it matters, and what actions are required to pursue it responsibly.

Coordinated

The work may involve multiple teams or professionals. KDA is designed to reduce the gap between good advice and the work that follows.

Protected

The goal is not a shortcut. It is legal, fact-specific planning paired with disciplined preparation and compliance-minded execution.

Your tax return should reflect more than what happened. It should reflect what was thoughtfully planned.

LET'S START WITH THE FULL PICTURE

See what a more proactive tax relationship could look like.

Whether you are a business owner, investor, high-income professional, or self-employed taxpayer, the first conversation is about understanding your facts and determining whether KDA is the right fit.

BOOK A CONSULTATION

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