



CASE STUDY • INDUSTRIAL AUTOMATION • QUAD CITIES, ILLINOIS AND IOWA

FROM GUESSING AND OVERPAYING TO DOCUMENTED ANSWERS.

How Chandler Got Backup He Could Check Himself

“That's a concrete thing, the communication is top-notch with you guys.”

CHANDLER • INDEPENDENT MANUFACTURER'S REPRESENTATIVE

Quotes are word for word from Chandler's client video interview.

CLIENT

Chandler

Independent Manufacturer's Representative

INDUSTRY

Industrial Automation

LOCATION

**Quad Cities,
Illinois and Iowa**

AT A GLANCE

CHANDLER WAS TIRED OF GUESSING.

Tax bills were due every month and every quarter, he did not know the amounts, so he picked a percentage and paid extra.

What changed first was the quality of the answers, **and the documentation attached to them.**

CLIENT SNAPSHOT

CLIENT

Chandler, Independent Manufacturer's Representative

INDUSTRY

Industrial Automation

LOCATION

Quad Cities, Illinois and Iowa

PREVIOUS SITUATION

Guessing at what he owed every month and quarter, purposely overpaying to avoid the notices, and questions to a prior CPA that came back late, general, or not at all

85.62%

SAVINGS IDENTIFIED IN THE FIRST ROADMAP

7

STRATEGIES IMPLEMENTED TO DATE

Individual results vary. Savings depend on each client's facts, documentation and implementation.

**ANSWERS
THAT COME
BACK**

**BACKUP
FROM THE
SOURCE**

**CONFIDENCE,
MONTH BY
MONTH**

THE CHALLENGE

01 AN OWNER WHO OVERPAID ON PURPOSE.

Chandler is an independent manufacturer's representative for industrial automation in the Quad Cities. He carries the revenue and the risk, and he carried the tax question alone. **He has one word for how that felt.**

“Overall, I would say the biggest feeling or the biggest takeaway that I had before working with you guys was uncertainty.”

CHANDLER

Not fear. Not anger at a bill. Uncertainty, which is harder to solve, because there is nothing concrete to fix.

So he solved it the way a lot of owners do. **He paid extra.**

“I was guessing at how much I owed, so I would be purposely overpaying just so I didn't have to deal with the headache of all of the notices and everything like that.”

CHANDLER

THAT SENTENCE IS THE WHOLE CASE.

The overpaying was not an accident. It was a decision, made on purpose, to buy peace.

Peace bought that way has a price, and Chandler names it.

“ It kind of put a damper on my business and reinvesting back into it because I had tax bills that were due every month and quarter, and I didn't know what they were, and I just guessed at a percentage.”

CHANDLER

THAT IS NOT A MISSED DEDUCTION.

That is cash leaving the business early, on a guess, month after month, instead of going back into what he was building.

When Tyler asked what he most wanted solved, **the answer was not a savings target.**

“ It was getting a lot more accurate in my dollar amount and how much I owed and what I owed to various agencies, whether it be federal or state, and just helping me get a handle on that so I wouldn't just overpay at the beginning and then get a large tax rebate at the end of the year. I wanted to be able to keep that money and utilize it for myself.”

CHANDLER

Chandler talks about that year-end rebate like a loan he never meant to make.

THE SOLUTION

02 ANSWERS WITH THE SOURCE ATTACHED.

What changed first was not a strategy. **It was whether his questions came back.**

“All of my questions are being answered in a reasonable amount of time with documentation and backup either from the IRS's website directly or third-party sources that offer guidance.”

CHANDLER

Three things live in that sentence, and none alone would have been enough.

01

ANSWERED

The questions get answered.

02

IN A REASONABLE AMOUNT OF TIME

They get answered in a reasonable amount of time.

03

WITH DOCUMENTATION

They arrive with documentation, from the IRS's own website or from third-party guidance, so he can go look at the source himself.

Tyler and Chris are the two he credits by name. **That third piece is where the story turns, because it is what he did not have before.**



That was the biggest gap in my CPA and my tax advisory strategy is I would ask a question and I either wouldn't get an answer or I'd get a very delayed answer and it'd be very general."

CHANDLER

A general answer to a specific question leaves an owner where he started. He cannot decide anything, so he falls back on his only tool. For Chandler, a percentage.



That's a concrete thing, the communication is top-notch with you guys."

CHANDLER

CONCRETE IS HIS WORD.

What he values first is not a move somebody made for him. It is being able to check the work himself.

THE RESULTS

03 BETTER CONFIDENCE, MONTH TO MONTH.

Chandler does not report a savings figure, and the interview never asked for one. **What he reports is a change in how he runs the business.**

“ And then from there that's allowed me to be more confident in my tax strategy in terms of how I'm structuring my business, how I'm paying myself, entities, all that type of stuff.”

CHANDLER

85.62%

SAVINGS IDENTIFIED IN THE FIRST
ROADMAP

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STRATEGIES
IMPLEMENTED TO DATE

Individual results vary. Savings depend on each client's facts, documentation and implementation.

WHAT SHIFTED

HERE IS WHAT SHIFTED.

BEFORE	AFTER	WHAT SHIFTED
~~From guessing at a percentage~~	to answers with documentation behind them.	His questions come back with source material attached. He does not have to take an answer on faith.
~~From delayed and general~~	to answered and specific.	The gap he names in his previous arrangement was response. Questions went out and came back late, broad, or not at all. Now they come back.
~~From overpaying to avoid a headache~~	to strategies he is putting in place.	He is careful about how far along he is, and his own wording is the right wording: "I'm seeing some of the results from implementing some of the strategies that you guys have guided me with." Some of the results. Some of the strategies. That is what the early stretch honestly looks like.
~~From uncertainty~~	to confidence on a cadence.	"I've got a lot better confidence in what I'm doing on a month-to-month, quarter-by-quarter basis and then I'm moving forward." Confidence is the outcome he names, and he names it in the rhythm of his year rather than at one deadline in April.

ADVICE

CHANDLER'S ADVICE TO OTHER BUSINESS OWNERS

Tyler's closing question described an owner with a rising tax bill, frustrated with the government and still on the fence. **Chandler did not hedge.**

“My advice would be just listen to Tyler and listen to Chris. They are good at what they do. They've got documentation and they've got concrete strategies to help you reduce and minimize that tax bill so you can keep more of your money that you worked really hard to earn.”

CHANDLER

DOCUMENTATION TURNS UP AGAIN, UNPROMPTED, IN THE SAME BREATH AS THE STRATEGIES.

For an owner who spent years asking questions into silence, that is the reason he stayed.

READY TO STOP GUESSING AT WHAT YOU OWE?

FRIENDS DON'T LET FRIENDS OVERPAY THE GOVERNMENT.

The first step is a conversation. No pressure, no obligation, just a clear look at what you owe, why, and what can be done about it.

YOU'RE A FIT IF

Make Taxes Fair works best with

- ✓ business owners paying \$50,000 or more in annual federal taxes who want to know what they owe and why, and who will do the documentation that keeps a legal, audit-ready strategy defensible.

NOT A FIT IF

- ✗ If you want aggressive loopholes, shortcuts, or a preparer who files in April and goes quiet, this is not the right fit.

Make Taxes Fair has a name for the advisor who records what already happened, files the form, hands you the bill, and never tells you what was possible. The Happy Historian. Chandler is describing his own arrangement there, not anyone else's. It is still a fair question to ask about yours: **when you send a specific question, does a specific answer come back, with the source attached?**

START A STRATEGY CONVERSATION TODAY →

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