



CASE STUDY · CHUCK & DANIELLE

FROM FRUSTRATED TO **\$44,690** IN FOUND SAVINGS.

How a **Tax Strategy Roadmap** mapped eight legal moves for two business owners who already knew there was more on the table, and couldn't get their old advisor to walk it with them.



CLIENTS

Chuck & Danielle
Names changed for
privacy

INDUSTRIES

**Safety Training
+ Coaching**

COMBINED SALES

\$3.6 Million
~\$570K Net Income

ENGAGEMENT

**Tax Strategy
Roadmap**
Washington State

AT A GLANCE

**TWO HUNGRY OWNERS.
ONE HAPPY HISTORIAN
WHO WOULDN'T ENGAGE.**

Chuck runs a \$3.5M safety training company for the trades. Danielle runs a six-figure coaching and consulting practice. Both growing, both profitable, both paying attention. They'd found strategies on their own — and couldn't get their existing advisor to engage with any of it.

CLIENT SNAPSHOT	
CLIENTS	Chuck & Danielle
BUSINESSES	Safety training for the trades + coaching & consulting
LOCATION	Washington State
COMBINED GROSS	\$3.6 Million
COMBINED NET	~\$570,000
BEFORE MTF	Self-discovered strategies, silent advisor, money on the table

8

CORE STRATEGIES SURFACED

Tier-one fundamentals — no capital outlay, no fancy structures, all in the code.

\$44.7k

FEDERAL TAX SAVINGS

A 30% reduction in their federal tax bill — fundamentals only, no advanced moves yet.

\$113k

MISSED DEDUCTIONS FOUND

Sitting on the return, waiting for an advisor willing to read it.

THE PROBLEM IN ONE LINE

THEY KNEW THERE WAS MORE ON THE TABLE. THEY JUST COULDN'T GET ANYONE TO WALK THE TABLE WITH THEM.

THE SHIFT IN ONE LINE

A ROADMAP, EIGHT STRATEGIES, AND A 30% CUT TO THE FEDERAL BILL, FUNDAMENTALS ONLY.

THE CHALLENGE

01 TWO OWNERS DOING THE HOMEWORK. AN ADVISOR WHO WOULDN'T PLAY.

Chuck and Danielle are the kind of business owners every advisor should want in the chair. Growing. Profitable. Paying attention. They'd already gone hunting on their own — read about the Augusta Rule, seen mentions of incentive credits, walked into the office with questions.

“*They came to their existing advisor with questions and got the same thing too many business owners get. Silence. Or worse, a polite redirect back to the return.*”

THAT IS THE HAPPY HISTORIAN AT WORK.

They record what already happened, file the form, hand you the bill, and tell you it's the best they can do. They're not lying. It's just the only game they know how to play.

Chuck's safety training company was clearing \$3.5M in gross sales with about \$500,000 in net income split between W-2 wages and K-1 pass-through. Danielle's coaching practice was running closer to \$100K gross, \$70K net — selling her time, not equipment and floor space.

So when Chuck and Danielle showed up at our door, they weren't desperate. They were frustrated. They knew there was more on the table. They just couldn't get anyone to walk the table with them.

That is the gap between tax preparation and tax strategy. Preparation records the past. Strategy shapes the future. Chuck and Danielle were stuck on the wrong side of that line — for almost a decade.

THE HIDDEN COST

Chuck and Danielle have been running their businesses for almost ten years. Apply the savings they just unlocked across the decade they've already worked, and the picture gets ugly fast — north of a million dollars of profit they earned and lost.

A DECADE OF RESOURCES LOST TO THE ABYSS

THE SOLUTION

02 A ROADMAP. RUN THROUGH THE CLEAR EDGE FRAMEWORK.

We pulled their actual return and ran it through every pillar: **credits, legal structure, employees, accountable plans, deductions, retirement, health, compliance, and entity design.** Two tiers – fundamentals first, advanced moves teed up for later. Chuck and Danielle’s roadmap returned eight tier-one fundamentals, ready to implement.

01 AUGUSTA RULE

Rent your home to your business up to 14 days a year. Tax-free income to you, full deduction to the business. Fully legal, fully in the code.

03 BOARD OF DIRECTORS

A real, documented board with real meetings. Unlocks legitimate director compensation, travel, and meeting expense deductions.

05 MAXIMIZING RETIREMENT

Bigger plans, the right plan type, optimized employer contributions. Most owners are underfunding the most powerful deduction in the code.

07 ADA TAX CREDITS

Their training facility had compliance work that mapped to the Disabled Access Credit. We caught it. Their previous advisor didn’t.

02 ACCOUNTABLE PLAN

Reimburse yourself for legitimate business use of phone, home office, vehicle, and other shared expenses. Business deducts. You pocket the reimbursement tax-free.

04 HIRING THE KIDS

Two children under 18, both old enough to do real work. Wages shift income from a 35% bracket to a 0% bracket, and the business deducts every dollar.

06 HSA OPTIMIZATION

Pair the right health plan with a Health Savings Account and stack a triple tax advantage: deductible going in, tax-free growth, tax-free out.

08 CORPORATE COMPLIANCE

Not glamorous, but if your minutes, resolutions, and structure aren’t airtight, every other strategy is sitting on sand. We dialed it in.

THE COMMON THREAD

EIGHT STRATEGIES. NO GIMMICKS. EVERY ONE WRITTEN INTO THE TAX CODE ON PURPOSE.

THE RESULTS

03 THE MATH. BEFORE VS. AFTER.

A 30% reduction in their federal tax bill in one roadmap, with zero advanced strategies pulled off the shelf yet. Just the fundamentals – the basics that should’ve been on the table years ago.

TAXABLE INCOME	\$569,605	→	\$456,205
FEDERAL TAX LIABILITY	\$146,777	→	\$102,087
TAX BRACKET	35%	→	32%
EFFECTIVE RATE AFTER STRATEGY	—	→	26%

THE TOP THREE TO IMPLEMENT RIGHT NOW

<p>01</p> <p>THE AUGUSTA RULE</p> <p>Easiest fast win. Document a few legitimate business meetings at the home. Done.</p>	<p>02</p> <p>HIRING THE KIDS</p> <p>Two children, real work, real wages, real deductions – and a major shift in family-level taxable income.</p>	<p>03</p> <p>THE ACCOUNTABLE PLAN</p> <p>A one-time setup that pays out every single month going forward.</p>
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WHAT'S POSSIBLE NEXT
TIER TWO IS ON THE SHELF.

Equipment leasing, entity refinements, charitable structures. For a profitable owner in the 35% bracket with a multi-year horizon, tier-two strategies can drive the bracket toward zero.

THE SPREAD

\$44,690 federal savings. **\$113,400** missed deductions. A **30% cut** to the federal bill – before tier two.

FUNDAMENTALS ONLY • YEAR ONE



THIS IS NOT FOR EVERYONE

READY TO FIND OUT WHAT'S HIDING IN YOUR RETURN?

The Tax Strategy Roadmap works best for U.S. business owners paying **\$50,000+ in annual federal taxes** who want to actually understand their strategy — not just outsource it. Owners who treat their tax bill the way they treat their P&L: as a number that's supposed to move when you make smart decisions.

YOU'RE A FIT IF

- ✓ You're paying \$50k+ in annual federal taxes
- ✓ You want strategy, not shortcuts
- ✓ You'll do the documentation work
- ✓ You want legal, audit-ready implementation

NOT A FIT IF

- ✗ You want gray-area loopholes
- ✗ You want a preparer who disappears until April
- ✗ You won't harvest the savings we hand you
- ✗ You're hunting TikTok-grade tax advice

GET MY TAX STRATEGY ROADMAP →

VISIT

maketaxesfair.com

FIRST STEP

Pull the return.
Read the map. Decide.

THE PROMISE

Friends don't let friends
overpay the government.