MAKE TAXES FAIR

CLIENT CASE STUDY
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CONFIDENTIAL

CASE STUDY · PHYSICAL THERAPY · PHOENIX, ARIZONA

FROM ALWAYS CATCHING UP TO A PLAN TAKING SHAPE.

How Jenna Is Learning What She Did Not Know About Her Own Taxes

> **“Historically in the past, I feel like I've overpaid a lot but didn't really know what to do about it.”**
>
> JENNA · CO-OWNER

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

CLIENT	INDUSTRY	LOCATION
Jenna Co-Owner	**Physical Therapy**	**Phoenix, Arizona**

AT A GLANCE

JENNA IS EARLY.

She co-owns a physical therapy clinic in Phoenix, she came to Make Taxes Fair wanting a plan, and the first thing she found was the size of what nobody had shown her. She is honest about where that leaves her.

CLIENT SNAPSHOT

CLIENT
Jenna, Co-Owner

INDUSTRY
Physical Therapy

LOCATION
Phoenix, Arizona

PREVIOUS SITUATION
A stressful tax season spent trying to catch up, and a long-running suspicion that she had been overpaying without knowing what to do about it

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A HANDLE SHE IS STARTING TO GET.

A PLAN GOING INTO PLACE.

A LOT STILL AHEAD.

That is where the work starts, and Jenna is in the middle of it.

A PLAN TAKING SHAPE

QUESTIONS SHE DID NOT KNOW TO ASK

A LONG WAY TO GO, AND SHE SAYS SO

THE CHALLENGE

01 A SUSPICION SHE DID NOT KNOW WHAT TO DO WITH.

Patients, staff, schedules, payroll, a building to keep open. **Jenna's days were full before taxes showed up on somebody else's schedule and asked her to be ready.**

> **“Tax season was always really stressful for me. I always felt like I was trying to catch up and I guess find ways to save money.”**
>
> JENNA

Catching up is what it feels like when the year is already closed and every decision that could have moved the number is already behind you.

THEN THE PART UNDERNEATH, WHICH SHE SAYS CAREFULLY.

> **“Historically in the past, I feel like I've overpaid a lot but didn't really know what to do about it.”**
>
> JENNA

SHE DOES NOT SAY SHE OVERPAID. SHE SAYS SHE FEELS LIKE SHE DID.

That is the honest position for an owner who has never had anyone walk a return with her line by line.

A suspicion is not a finding. It is the sense that something was available and nobody named it.

When Tyler asked what Jenna most wanted solved, **her answer was not a dollar amount.**

> *"The problem that I wanted to solve mainly by working with you guys was trying to figure out more of a plan..."*
>
> JENNA

A PLAN. NOT A REFUND, NOT A RESCUE.

A return records a year that is finished.

A plan gets made while the year is still open, which is the only time it can change anything.

THE SOLUTION

02 NAMING THE THINGS SHE DID NOT KNOW TO ASK ABOUT.

The first thing that changed for Jenna was not her tax bill. It was her field of vision.

> “It's very eye-opening to all the different ways that you can save money and all these different strategies that you can utilize.”
>
> JENNA

EYE-OPENING IS JENNA'S WORD, AND SHE REACHES FOR IT TWICE.

For Jenna, that came before any strategy got implemented. **She found out what the menu even is: which structures fit a clinic, and which ones depend on decisions made before the year closes.**

Generally speaking, the strategies worth having are the ones written into the tax code specifically to reward owners who put real structure and documentation behind real business activity. None of them are shortcuts, and most stay invisible until somebody trained to see them points at them.

WHAT THAT MEANT WAS A LIST OF THINGS SHE HAD NOT KNOWN TO ASK ABOUT.

Not because she was careless, but because nobody had handed her the list.

WHAT SHE CAME FOR WAS THE PLAN, AND IT IS GETTING BUILT.

> **So I finally feel like I'm getting a plan in place to kind of start that, which will help set everything up in the future for it to be a lot easier."**
>
> JENNA

GETTING.
KIND OF START.
IN THE FUTURE.

Jenna is describing a beginning, not a finish, and every qualifier in that sentence is doing honest work.

THE RESULTS

03 STARTING TO GET A HANDLE.

Ask Jenna what has changed and she does not reach for a figure. **She reaches for a feeling, then qualifies it in the same breath.**

> **Yeah, I feel like I'm definitely starting to get a handle of things. I know that there's a long way to go and I still have a lot to learn."**
>
> JENNA

BOTH HALVES ARE TRUE AT ONCE. HERE IS WHAT HAS SHIFTED.

From always catching up to starting to get a handle.

The stress was never really about paperwork. It was about arriving late to her own decisions. Starting to get a handle is exactly as far as she says she has come, and it is further than where she began.

From not knowing what she did not know to seeing what is out there.

The strategies did not appear this year. They were already there. What is new is that Jenna can see them, which is the requirement for ever using one.

From no plan to a plan going into place.

She asked for a plan and she is getting one. In her own words it is meant to set things up for the future, and the future is where she puts it.

From carrying it by herself to asking for help.

The load Jenna names is not just the filing. It is carrying the tax question on top of running a clinic. Her own word for the fix is help, and she recommends asking for it.

ADVICE

JENNA'S ADVICE TO OTHER BUSINESS OWNERS

Tyler asked what Jenna would say to another business owner with a large tax bill who was on the fence. **She did not oversell it.**

> **I guess my advice would be to just book a call and chat with you guys and see if it would be a good fit because I guess you don't know what you don't know."**
>
> JENNA

YOU DON'T KNOW WHAT YOU DON'T KNOW.

The missing piece is not effort and it is not intelligence. It is exposure. An owner cannot ask about a strategy she has never heard of, and she cannot weigh an option nobody has put in front of her.

> *And it was very eye-opening to me of all the things that I didn't know."*
>
> JENNA

THEN THE PART ABOUT THE WEIGHT OF DOING IT ALONE.

> **So I would definitely recommend taking that load off of your plate and reaching out and asking for help."**
>
> JENNA

NOTICE WHERE SHE SETS THE BAR.

See if it would be a good fit. **Not sign up. See.**

FIT

THIS IS NOT FOR EVERYONE

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 understand their own plan instead of handing it off, and who will do the documentation that keeps a legal, audit-ready strategy defensible.

NOT A FIT IF

- ✗ If you are hunting for loopholes, shortcuts, or a preparer who files in April and disappears, this is not the right fit.
- ✗ And if you want it all settled by next quarter, Jenna would tell you it does not work that way. She says there is a long way to go, and she says it on camera.

READY TO SEE WHAT YOU HAVE NOT BEEN SHOWN?

FRIENDS DON'T LET FRIENDS OVERPAY THE GOVERNMENT.

The first step is a conversation. No pressure, no obligation, just an honest look at what applies to your business and what does not.

But if tax season has always meant catching up, and you carry a quiet suspicion that you have been paying more than you had to without knowing what to do about it, that is exactly where Jenna started. She is in the middle of it right now, with a plan coming together around her.

START A STRATEGY CONVERSATION TODAY →

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