



CLIENT CASE STUDY

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CONFIDENTIAL



CASE STUDY • PHYSICAL THERAPY • TEMPE, ARIZONA

FROM HEARING ABOUT TAX STRATEGIES TO **ACTUALLY** **USING THEM.**

How Josh Found Out Which Ones Applied to His Own Clinic

**“ I think it's the difference between
being proactive versus reactive.”**

JOSH • CLINIC OWNER

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

CLIENT

Josh

Clinic Owner

INDUSTRY

Physical Therapy

LOCATION

Tempe, Arizona

AT A GLANCE

JOSH KNEW TAX STRATEGIES EXISTED.

He had heard about them and seen them online. What he could not do was use any of them, which is a different problem from not knowing.

Make Taxes Fair changed the question from what exists out there **to what applies here**, and moved the work off the April calendar onto a monthly one.

CLIENT SNAPSHOT

CLIENT

Josh, Clinic Owner

INDUSTRY

Physical Therapy

LOCATION

Tempe, Arizona

PREVIOUS SITUATION

Filing on his own every spring, aware that tax strategies existed, with no way to know which ones applied to his clinic

THE GAP

OUT OF REACH. NOT UNKNOWN.

**WHAT
ACTUALLY
APPLIES TO
HIM**

**PROACTIVE
INSTEAD OF
REACTIVE**

**DIALED IN
BEFORE
APRIL**

THE CHALLENGE

01 TAX STRATEGIES HE COULD NAME AND COULD NOT USE.

Josh owns a physical therapy clinic in Tempe, Arizona. **He is not an owner who had never heard of tax planning, and that is what makes his story worth telling.**

“ I feel like I've heard a bunch, all these tax strategies, or you see them online, but you have no idea how to actually use them, or what actually applies to you.”

JOSH

Two separate gaps sit inside that one sentence.

THE FIRST IS MECHANICAL.

How do you actually use one of them.

THE SECOND IS HARDER.

Which of them, if any, fits a physical therapy clinic in Arizona, with his entity, his numbers, and his year.

A search bar sheds light on the first but still doesn't give the full picture. **Nobody hands out the second for free, because answering it takes somebody looking at his business.**

The clinic gave him a reason to care about the answer.

“ *But opening up a business like a physical therapy practice, the margins aren't the biggest, and so I'm gonna try to keep every single dollar that we have, and I know there's ways to do that.*”

JOSH

His words, hedge included. The margins aren't the biggest. He is describing an owner who counts, and the counting is why those strategies mattered to him.

Then the line that names the whole gap.

“ **But being able to actually do those tax strategies is something that's been way out of my reach until we started working with you guys.**”

JOSH

**OUT OF REACH.
NOT UNKNOWN.**

Out of reach is what a thing becomes when you can see it and cannot get your hands on it.

Until that changed, tax season had a familiar shape.

“Tax season was usually an afterthought, jumping on TurboTax, hoping that I got a good result, but not really knowing. I'm just kind of playing TurboTax roulette, really.”

JOSH

An afterthought. Hoping. Not really knowing. There is no bad advisor in this story and nobody failed Josh. He was doing it himself in tax software, the way a great many owners do. It processed what he brought it and had no way to tell him what he never brought.

THE SOLUTION

02 WHICH STRATEGIES APPLY TO HIM, AND HOW TO USE THEM.

**Josh does not name a
single strategy on camera.
What he names instead is access.**

The distance he describes is the one between general information and a specific business. Generally speaking, a tax strategy is not something an owner adopts because it read well online. It has to fit the entity, the income, the timing, and the documentation the owner is willing to keep.

That fitting is the work, and no article can do it from a distance without seeing the books.

What changed, in Josh's telling, was not how much information existed. It was whether any of it pointed at his clinic.

Notice he does not claim it happened in one meeting. His phrase is “until we kind of started working with you guys,” and that honesty is his, so it stays.

THE SECOND THING THAT MOVED WAS THE CLOCK.

Decisions that change a tax year generally have to be made inside that year, so an owner who opens the question in April is asking about a year that already finished.

THE RESULTS

03 STRATEGY ON A MONTHLY CLOCK.

Asked how things had changed, **Josh answered with a distinction rather than an outcome.**

“I think it's the difference between being proactive versus reactive.”

JOSH

He described both sides, the old one first.

BEFORE

“I think beforehand it was all about like, oh yeah, it's April, let's figure out what TurboTax is asking for, trying to get everything together.”

JOSH

And the new one.

NOW

“Now it's more of a, how do we attack this on a monthly basis so that come April we're ready and already have everything dialed in.”

JOSH

NOTE THE PRONOUN. HOW DO WE ATTACK THIS.

WHAT SHIFTED

HERE IS WHAT SHIFTED.

BEFORE	AFTER	WHAT SHIFTED
~~From an afterthought~~	to a monthly job.	Tax season used to be what Josh turned to once the rest of the year was over. It is now a recurring item with a rhythm behind it: the difference between reporting a year and working one.
~~From strategies he read about~~	to strategies within reach.	The list did not get longer. It got closer. In his own framing, doing those tax strategies had been way out of his reach until he started working with the team.
~~From reactive~~	to proactive.	His own words for his own change. Reactive means the year decides and the owner responds to it. Proactive means the owner is deciding while the year is still open.
~~From hoping for a good result~~	to preparing for April on purpose.	Hoping was the old method, in his telling, and hoping is not a method. The monthly work exists so April arrives with everything gathered rather than scattered.

ADVICE

JOSH'S ADVICE TO OTHER BUSINESS OWNERS

Tyler's closing question described a hypothetical owner sitting on a massive tax bill and still on the fence. **Josh answered it as arithmetic.**

“ I mean, I think you're just leaving money on the table.”

JOSH

Then the trade he had already made himself.

“ *If you have a tax bill that big and you're not willing to work with these guys and get that dialed in, I just think I would much rather pay someone to help me reduce my tax burden rather than give it to the government.”*

JOSH

PAY A PROFESSIONAL, OR PAY THE GOVERNMENT.

Framed that way, hiring a strategist stops being an expense question.

He closed with this.

“ And these guys are the best at doing it and so far it saved me a lot of money. And so it's definitely worth it.”

JOSH

So far is his phrase, and it stays his.



READY TO FIND OUT WHICH STRATEGIES APPLY TO YOUR BUSINESS?

FRIENDS DON'T LET FRIENDS OVERPAY THE GOVERNMENT.

The first step is a conversation. No pressure, no obligation, just a straight answer about what is actually within reach for the business you own.

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 which strategies apply to their own business, and who will do the monthly work and the documentation that keeps a legal, audit-ready strategy defensible.

NOT A FIT IF

- ✗ If you want a shortcut, a loophole, or a preparer who files in April and is not heard from again until the next one, this is not the right fit.

NOTHING HERE IS PASSIVE.

If you have been reading about tax strategies for years and quietly wondering which of them were ever meant for a business like yours, that question has an answer. **Josh got his.**

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