MAKE TAXES FAIR

CLIENT CASE STUDY
NO. 09 · 2026
CONFIDENTIAL

CASE STUDY · PHYSICAL THERAPY · RALEIGH, NORTH CAROLINA

FROM ONE OWNER'S JOB TO BOTH OWNERS' UNDERSTANDING

How Josie Joined a Tax Conversation She Had Left to Her Husband

> **“You guys break everything down super simple and understandable.”**
>
> JOSIE · CO-OWNER, ONWARD RALEIGH

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

CLIENT	COMPANY	INDUSTRY	LOCATION
Josie Co-Owner	**Onward Raleigh**	**Physical Therapy**	**Raleigh, North Carolina**

AT A GLANCE

JOSIE OWNS A PHYSICAL THERAPY COMPANY WITH HER HUSBAND, SCOTT.

For years the tax side of it sat on his desk and not hers. She reports no dollar figure and names no strategy.

She reports what comes before either one: **she understands how her own business is taxed, and she is in the conversation now.**

CLIENT SNAPSHOT

CLIENT	COMPANY
Josie, Co-Owner	Onward Raleigh
INDUSTRY	**LOCATION**
Physical Therapy	Raleigh, North Carolina

PREVIOUS SITUATION

Taxes treated as her husband's side of the business, and a shared understanding she describes as a little blurry

8 STRATEGIES IMPLEMENTED TO DATE

SMALL PRINT

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

BOTH OWNERS IN THE CONVERSATION

ONE STEP AT A TIME, IN ORDER

NO LONGER HER HUSBAND'S ROLE ALONE

THE CHALLENGE

01 A CO-OWNER WHO HAD HANDED OFF AN ENTIRE SIDE OF THE BUSINESS

Josie opens with a sentence most business partners would recognize and few would say out loud.

> **“Taxes were non-existent in my mind. That was more of my husband's role.”**
>
> JOSIE

She is describing herself, an owner of the company:

“My husband, Scott and I own a physical therapy company in Raleigh, North Carolina.”

TWO OWNERS SPLIT THE WORK:

one takes the clinical side, the other takes the books.

THE TAX SIDE OF THE COMPANY STILL BELONGED TO BOTH OF THEM,

and the side Josie had moved out of her head was still attached to her.

Her story is more than a clean handoff, because the understanding was thin on both sides of the split.

> **“And even then, our understanding of them was a little blurry.”**
>
> JOSIE

BLURRY FOR BOTH OF THEM.

Not that he understood it and she did not. The work had been assigned. The clarity never arrived with it.

> *“Yeah, we were a little lost in just understanding it all.”*
>
> JOSIE

A little blurry. A little lost. Deliberately small words. There is no crisis here and no advisor who let her down. Nobody failed her. Taxes were somebody else's job, and somebody else was not sure about it either.

Tyler put it back to her: does this tend to be the case with almost all of us? Her answer ran three words.

> **“Yeah, it's so confusing.”**
>
> JOSIE

Asked what she and Scott talked about most, she named a gap rather than a grievance.

> **Probably just where we were lacking, like the tax savings opportunities, just how as a business we could strategize that better and learn how to help our money make us more money."**
>
> JOSIE

WHERE WE WERE LACKING.
NOT WHAT WENT WRONG.

Two owners who suspected their business had tax strategy available to it and could not see it.

THE SOLUTION

02 AN EXPLANATION BUILT FOR SOMEONE STARTING FROM OUTSIDE

What changed for Josie was not a filing.
It was the way the material got handed to her.

> **You guys break everything down super simple and understandable."**
>
> JOSIE

That reads like a small compliment until you consider who is paying it. A partner who has kept a subject out of her head for years does not need a better spreadsheet. She needs an entry point. A tax conversation delivered all at once confirms every reason she had for delegating it.

> **Josie describes the opposite. She describes sequence, and she describes pace.**
>
> The work arrives in order, and nothing depends on her having absorbed the whole subject before the first conversation ends.

Her word for the speed is the one that matters: "at a digestible, easy to understand pace."

PACE IS A DESIGN CHOICE.

A firm can move at the speed of the people who already know the material, or at the speed of the owners it is teaching.

There is a second effect Josie does not name. When both owners sit inside the same explanation, they stop carrying two different versions of the company's tax picture. The blurry understanding was shared. The clearer one is shared too.

THE RESULTS

03 UNDERSTANDING IS THE OUTCOME

Josie names no savings figure. She names no strategy, no election, no before and after. **What she names is what she knows.**

> **“I have a much greater understanding of just how taxes work, how it is structured and what goes into filing your taxes and what everything means on the backside of it that I never really knew or even understood before working with you guys.”**
>
> JOSIE

HERE IS WHAT SHIFTED.

~~From “more of my husband's role”~~

to a seat at the table.

The side of the company Josie had moved out of her own mind is back in it. She is not receiving a summary of decisions already made. She is in the conversation where they get made.

~~From a little blurry~~

to a much greater understanding.

Her own before and after, in her own words, and neither end of it is a number. The vagueness she and Scott shared has been replaced by something she can describe on camera.

~~From filing as a closed box~~

to knowing what the pieces mean.

She calls it the backside: what goes into a return and what everything on it means. That is the layer most owners never see, and it decides whether a strategy conversation is possible.

~~From understanding~~

to decision-making.

This is the one that compounds, and Josie states it carefully.

> **“Having that better understanding on the backside, I think helps guide our decision-making as business owners a little bit better.”**
>
> JOSIE

I THINK.
A LITTLE BIT BETTER.

She hedges it, and the hedge is the honest part. She is reporting an early effect on how two owners make choices, not declaring a transformation.

ADVICE

JOSIE'S ADVICE TO OTHER BUSINESS OWNERS

Asked what she would tell another business owner sitting on the fence, **Josie did not hesitate.**

> **“Highly, highly recommend working with you guys.”**
>
> JOSIE

Then she described what she was recommending, and it was not a result. It was a method.

> *“Really help come up with that plan of like, all right, step one, we're gonna do this, this and this. Step two, after you have done one, now we can dive into this, kind of furthering those steps along the way, but at a digestible, easy to understand pace.”*
>
> JOSIE

Step one, then step two only after step one is done. Josie is not telling other owners that Make Taxes Fair will save them money. She is telling them they will be able to follow it, which for an owner who has been outside the tax conversation is the part that has to be true first.

READY TO GET BOTH OWNERS IN THE SAME CONVERSATION?

FRIENDS DON'T LET FRIENDS OVERPAY THE GOVERNMENT.

The first step is a conversation. No pressure, no obligation, just a clear look at how your business is taxed and what you can do 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 understand their own tax position rather than hand it off and hope. Owners who will sit through the explanation. Owners who want legal, documented, audit-ready implementation.

NOT A FIT IF

- ✗ If you are hunting for loopholes, shortcuts, or a preparer who files your return and disappears until next April, this is not the right fit.

And if you own a business with somebody else, this only works when both of you show up. Josie describes a seat plenty of partners are sitting in right now: an entire side of the company, understood by neither owner as well as they assumed. It holds until one of them has to make a decision the tax side touches.

START A STRATEGY CONVERSATION TODAY →

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