MAKE TAXES FAIR

CLIENT CASE STUDY
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CONFIDENTIAL

CASE STUDY · ROOFING AND CONSTRUCTION · RALEIGH, NORTH CAROLINA

FROM HANDLING IT HERSELF TO BUILDING THE COMPANY SHE PICTURED.

How Megan Built the Tax Side Into Her Growth Plan

> **"The strategy is mind blowing on what it is that they can help the company keep."**
>
> MEGAN · OWNER, NEW TESTAMENT ROOFING

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

CLIENT	COMPANY	INDUSTRY	LOCATION
Megan Owner	**New Testament Roofing**	**Roofing and Construction**	**Raleigh, North Carolina**

AT A GLANCE

MEGAN CAME TO MAKE TAXES FAIR WITH A VISION FOR THE COMPANY AND A CLEAR IDEA OF WHERE SHE WANTED THE MONEY TO GO.

What she did not have was anyone planning the tax side of that growth while the year was still in front of her.

IN HER WORDS

“HIGHLY REGRET THAT EXPERIENCE.”

CLIENT SNAPSHOT

CLIENT
Megan, Owner

COMPANY
New Testament Roofing

INDUSTRY
Roofing and Construction

LOCATION
Raleigh, North Carolina

PREVIOUS SITUATION
A newer company, a first year that ran six months with the filing on her own shoulders, and a growth plan with no tax strategy underneath it

STRATEGIES IMPLEMENTED
6 to date

01

BUILDING, NOT JUST FILING

02

PROJECTIONS EARLY IN THE YEAR

03

A STRATEGY UNDER THE VISION

THE CHALLENGE

01 A FOUNDER WITH A VISION AND NOTHING UNDERNEATH IT.

Megan runs a roofing and construction company in Raleigh, North Carolina. It is a newer company, and she was carrying the operations side by herself.

> *I'm the only one handling the operations here at this point in our company. We're a newer company."*
>
> MEGAN

Six months of business, and an owner who decided she would handle the filing herself.

> *So the first year we were open six months and I had decided to take it on myself."*
>
> MEGAN

HER OWN VERDICT ON THAT DECISION.

"Highly regret that experience."

There is no villain in this story. No advisor who stopped returning calls, no preparer who filed and vanished until April. Megan took it on herself, and found that running operations and handling taxes are two jobs, not one.

The feeling that came with it is one most owners recognize.

> *Before coming to Make Taxes Fair, tax season was an extremely daunting and stressful time for me."*
>
> MEGAN

DAUNTING IS THE WORD WORTH SITTING WITH.

Not expensive. Not complicated. Daunting is what a job feels like when you are not sure you are qualified and you do it anyway.

THE SOLUTION

02 A REAL TAX STRATEGIST TEAM, ATTACHED TO THE GROWTH PLAN.

What happened first was cleanup. The team went back through the six months she had already filed.

> *I was able to get a hold of Make Taxes Fair and they actually guided me through what it is that I went through for those six months of that year filing the taxes. And also helped me file our S corp and get all of that on track. And they were just there for me."*
>
> MEGAN

Generally speaking, the S corporation election is a tax election made on an entity that already exists, and whether it fits depends on the specifics of the business. Make Taxes Fair is a tax practice, not a law firm. We are not attorneys. Our aim here is to give you a very high level and general overview of this topic as it relates to taxes. We always recommend consulting with a qualified legal professional.

FOR MEGAN, THAT SETTLED THE DECISION.

“They just helped me get on board with them and it was a no brainer at that point.”

The cleanup is not why she went looking, though. Ask what she was trying to solve and she does not describe a problem. **She describes a plan.**

> **So when I first started with Make Taxes Fair, the reason I wanted to move forward with a real tax strategist team is because I had a big vision for our company and where it was going.”**
>
> MEGAN

Then she says where the money is meant to go, which is why the whole thing matters to her.

> *And my goal was I wanted to keep as much money as I can to build a company, and we're a faith-based roofing company, so I wanted to give back to the kingdom of God rather than the IRS, and Make Taxes Fair was going to be that piece for me that I really needed in order for us to grow the way I wanted us to grow.”*
>
> MEGAN

THAT IS A FOUNDER DESCRIBING TAX STRATEGY AS A BUILDING MATERIAL.

Every dollar that stays in the business is a dollar available for the growth she is building toward and the giving she started the company to do.

THE RESULTS

03 A COMPANY BUILT ON PURPOSE.

What Megan describes is not a windfall. **It is a rhythm.**

> **“Since working with Make Taxes Fair, like once a month, sometimes twice, they are helping me navigate my projections for the year as early as the second and third month of the year so that we can really prepare and navigate a strategy to keep as much money as possible.”**
>
> MEGAN

6 STRATEGIES IMPLEMENTED TO DATE

WHAT SHIFTED

HERE IS WHAT SHIFTED.

BEFORE	AFTER	WHAT SHIFTED
~~From doing it herself~~	**to a team on the file.**	Megan still runs operations. She is no longer the one running the return, and the six months she regrets have been walked through by people who do this every day.
~~From a regretted first year~~	**to a business on track.**	Her own phrase for it is “get all of that on track,” and it covers the filing behind her and the structure going forward.
~~From one tax season a year~~	**to planning that starts in the second month.**	Projections once a month, sometimes twice, as early as the second and third month of the year. Strategy is only strategy while the year can still be shaped.
~~From a big vision~~	**to a strategy underneath it.**	The vision came first. What Megan added was a team planning the tax side of that growth on the same calendar she builds on.

WHAT SHE GAINED DAY TO DAY IS ATTENTION.

> *Since working with them, it's just really been a lot more, I don't wanna say fun, taxes are never fun,”*
>
> she says, then names the part that counts:
>
> *“being able to focus on the business where I need to focus and trusting Make Taxes Fair to really deliver on what they promise and they do.”*
>
> MEGAN

ADVICE

MEGAN'S ADVICE TO OTHER BUSINESS OWNERS

Tyler asked what she would say to another owner carrying a large tax bill and still on the fence. She had already answered in real life.

> **I 100%, without a doubt, would recommend Make Taxes Fair, and I have."**
>
> MEGAN

Then the part she leads with, not a number.

> *The strategy is mind blowing on what it is that they can help the company keep."*

And the reason she trusts it.

> *And they lay it all out for you."*

LAID OUT. NOT HANDLED QUIETLY ON HER BEHALF.

Megan can see the strategy, which is why she puts her own name behind it.

> *And I would be more than confident in referring Make Taxes Fair to any business owner."*
>
> MEGAN

READY TO BUILD WITH MORE OF WHAT YOU EARN?

FRIENDS DON'T LET FRIENDS OVERPAY THE GOVERNMENT.

The first step is a conversation. No pressure, no obligation, just a clear look at where your business stands and what a plan could look like.

YOU'RE A FIT IF

Make Taxes Fair works best with

- ✓ business owners paying $50,000 or more in annual federal taxes who have a plan for the company and want the tax side planned on the same calendar.
- ✓ Owners who show up for a monthly cadence and keep the documentation that makes a legal, audit-ready strategy defensible.

NOT A FIT IF

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

But if you are the one running operations and doing the taxes and building the thing, and the tax side is the piece nobody is helping you plan, you are not alone. Megan had the vision before she had the strategy. The strategy is what let her build toward it.

START A STRATEGY CONVERSATION TODAY →

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maketaxesfair.com

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