



CASE STUDY • E-COMMERCE • SACRAMENTO, CALIFORNIA

FROM FILING WITHOUT AN ADVISOR TO LEARNING THE MECHANICS.

How Stanley Came to Name the Moves Running
Inside His Business, One Meeting at a Time

“And, you know, they make it super easy
for me to understand and move forward
with the business.”

STANLEY • OWNER, OKSTAN

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

CLIENT

Stanley

Owner

COMPANY

OKSTAN

INDUSTRY

E-Commerce

LOCATION

Sacramento, California

AT A GLANCE

STANLEY WANTED TO LEARN THE TAX STRATEGY, **NOT** **HAND IT TO SOMEBODY ELSE.**

He had a business, no CPA, no tax advisor, and a filing season he describes as a weight on his shoulders.

What changed is that **he can now name the moves running inside his business.**

CLIENT SNAPSHOT

CLIENT

Stanley, Owner

COMPANY

OKSTAN

INDUSTRY

E-Commerce

LOCATION

Sacramento, California

PREVIOUS SITUATION

Filing without a CPA or a tax advisor, with no way to know which deductions he was missing

BEFORE

NOBODY AT ALL.

**STRATEGIES
HE CAN NAME**

**PAYROLL ON
THE BOOKS**

**LEARNING
SOMETHING
EVERY
MEETING**

THE CHALLENGE

01 AN OWNER TRYING TO FIGURE OUT TAXES WITH NOBODY IN HIS CORNER.

Stanley runs an e-commerce business out of Sacramento, California. The business side worked. **The tax side sat on him.**

“ Oh, it was very stressful. Just a huge weight on my shoulders, just trying to figure how to file my taxes without being like a CPA or even just like a tax advisor.”

STANLEY

That is the whole before-state, and what is missing from it matters. No preparer who filed and vanished. No advisor who stopped returning calls. **Nobody at all.**

Which left him one option, **and he did not want it.**

“ And I didn't want to go through like doing it myself on FreeTaxUSA without, you know, missing any deductions or whatnot that can help me out. So it was pretty stressful.”

STANLEY

TAX SOFTWARE DOES EXACTLY WHAT AN OWNER TELLS IT.

It cannot flag what he never thought to enter. His worry was not filling a form out wrong. It was filling it out correctly and still leaving money behind.

Then Tyler asked what he specifically hoped to solve.

The answer was not “pay less.”



I really wanted to learn more about tax strategy and learn more about the LLC and S corporation status for my business and what would help the most. And mainly just tax advice in general.”

STANLEY

LOOK AT THE VERBS. LEARN MORE. LEARN MORE.

He was not asking anyone to handle it for him. He was asking what his options were and which fit the business he runs.

THE SOLUTION

02 THE ELECTION, THE PAYCHECK, AND A STANDING CONVERSATION.

The first change was structural, **and Stanley describes it in one breath.**

“ We elected an S corporation for my LLC. So I started giving myself an official payroll. So that was a big jump.”

STANLEY

Two separate things live in that sentence, and generally speaking they travel together. An S corporation election is a tax election, not a legal entity, so in most cases an LLC that makes the election remains an LLC. And owners who make it generally begin paying themselves a reasonable wage through payroll, which is often why the election and the first paycheck show up in the same conversation.

Whether the election fits depends on the business, the profit, and the state the owner operates in. Legal structure is one of the pillars inside our Make Taxes Fair CLEAR EDGE Framework, and it is often one of the first places we look.

One boundary, named out loud: 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.

The next piece does more work than owners expect.

**“ We worked with QuickBooks to help
bookkeep my stuff better.”**

STANLEY

BOOKKEEPING IS NOT A STRATEGY.

It is what makes a strategy provable. The tax code is written specifically to reward owners who can document what they did, and clean books are where that starts.

Then the part that **defines Stanley's story.**

**“ And then I just recently learned about the
Augusta Rule. So a lot of tax strategies that I've
been starting to learn pick up like every meeting
that we've had in like the past six months or so.”**

STANLEY

He is careful there, and so are we. He says he recently learned about it, and he says he is starting to pick things up. He is not claiming mastery. He is describing a cadence: a standing conversation where a new name or a new option comes up most times the team sits down.

THAT CADENCE IS THE PRODUCT.

A return gets filed once a year. A standing meeting is where an owner hears about an option while there is still time to use it.

THE RESULTS

03 AN OWNER WHO KNOWS THE NAMES OF HIS OWN MOVES.

Stanley does not report a dollar figure, and nobody asked him for one. **What he reports is fluency.**

BEFORE	AFTER	WHAT SHIFTED
From no CPA and no tax advisor	to a team he meets with.	The before-state was not a bad relationship. It was the absence of one. Stanley was the only person looking, so nobody was going to catch what he missed.
From an LLC on its own	to an S corporation election and an official payroll.	In his words, that was a big jump. He can describe what was elected and what he now does every pay period because of it.
From wanting to learn tax strategy	to naming strategies out loud.	The S corporation election. Official payroll. Bookkeeping he can trust. The Augusta Rule, a name he says he learned only recently. Stanley can walk through his.
From worrying about missed deductions	to being told what he should and possibly shouldn't do.	Those are his words, and the second half is what matters. Guidance that only ever says yes is not guidance. He is getting both answers.

ADVICE

STANLEY'S ADVICE TO OTHER BUSINESS OWNERS

Tyler asked what he would tell another owner with a large tax bill, still on the fence. **Stanley started with the team.**



Make Taxes Fair is great. They, especially the team that I'm currently working with, Chris and Mateo, they helped me walk through the steps very easily and they gave me the fundamentals and they even go above and beyond to tell me what I should and possibly shouldn't do for my business."

STANLEY

WALK THROUGH THE STEPS. GAVE ME THE FUNDAMENTALS.

Both phrases describe teaching, not outsourcing. He did not say they took it off his plate.

Then this.



And, you know, they make it super easy for me to understand and move forward with the business."

STANLEY

Understand, then move forward. In that order. An owner who understands the reasoning carries it into the next decision. An owner handed a filled-out form carries nothing forward.



READY TO LEARN HOW YOUR OWN TAX STRATEGY WORKS?

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 which options are on the table.

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 the mechanics of their own strategy, not just approve it.
- ✓ Owners who will sit in a regular meeting, ask questions, and do the documentation that keeps a legal, audit-ready strategy defensible.

NOT A FIT IF

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

None of what Stanley describes is passive.

Generally speaking, an election has to be filed and a payroll has to run.

But if you want to know what your options are and why, and nobody has ever explained them, Stanley started in the same place. **He had nobody to ask.**

START A STRATEGY CONVERSATION TODAY →

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