



CASE STUDY · JEFFREY RUTKOWSKI

# FROM **CONFUSION** TO **CONFIDENCE.**

How **Jeffrey Rutkowski** finally understands his tax strategy after years of jumping from preparer to preparer, unanswered questions, and a tax bill that rose and fell each year for reasons he could never explain.

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**CLIENT**

**Jeffrey Rutkowski**  
Founder

**INDUSTRY**

**Consulting,  
Entertainment &  
Advertisement**

**LOCATION**

**Los Angeles,  
California**

**ENGAGEMENT**

**Active · Ongoing**  
Strategy Partnership

AT A GLANCE

**A CONSULTANT WHO WANTED THE WHY BEHIND THE NUMBER.**

Jeff Rutkowski is the kind of business owner who wants to understand the decisions being made for his business. He is, in his own words, “a very in-the-weeds kind of person.” He pays attention. He asks questions. And for years, he could not get the answers he was looking for.

CLIENT SNAPSHOT

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| FOUNDER    | Jeffrey Rutkowski  |
| INDUSTRY   | Consulting, Entertainment & Advertisement  |
| LOCATION   | Los Angeles, California  |
| ADVISORS   | Tyler & Chris  |
| BEFORE MTF | Jumping preparer to preparer; unanswered questions; a tax bill that moved up and down for reasons he could never explain |

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TEAM THAT STAYS

No more starting over every year. The relationship – and the context – carries forward.

**100%**

OF QUESTIONS ANSWERED

Every lever, every credit, every reason something does – or does not – apply to him.

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ROCKS LEFT UNTURNED

Jeff is no longer guessing whether his preparer is doing the full job.

THE PROBLEM IN ONE LINE

**THE TAX BILL WOULD MOVE UP AND DOWN — AND THE REASONING STAYED HIDDEN.**

THE SHIFT IN ONE LINE

**STRATEGY THAT LIVES INSIDE THE BUSINESS OWNER — NOT JUST THE ADVISOR.**

## THE CHALLENGE

# 01 A BUSINESS OWNER WHO COULD NOT GET A STRAIGHT ANSWER.

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Jeff runs a consulting practice in the entertainment and advertisement world. He pays attention. He asks questions. And for years, he could not get the answers he was looking for.

“Before working with Make Taxes Fair, I was jumping from person to person to help me prepare and file. And never getting my questions answered, and always feeling like I was behind.”

**THE TAX BILL TOLD THE SAME STORY. SOME** years it went up. Some years it went down. The numbers shifted with the nature of the business, but the reasoning behind them stayed hidden.

“The tax bill would go up or down year to year, but it never made sense to me why it was the number that it was.”

Jeff had tried the usual options. Preparers referred to him by other people in his line of work. At one point, software — specifically TurboTax with an expert attached. None of it solved the real problem.

The real problem was not a missing form or a late filing. It was the absence of a partner willing to slow down, explain the tax code, and help him understand why his bill landed where it landed.

That is the gap so many business owners live inside. They are filing. They are compliant. They are paying a large bill every year. And nobody is showing them why.

**IN JEFF'S WORDS**

“I felt like my previous preparers were not taking the time to look under every rock to help me save money. I could just feel that they were not doing that.”

**JEFFREY RUTKOWSKI · FOUNDER**

## THE SOLUTION

## 02 A TEAM WILLING TO EXPLAIN THE WHY.

When Jeff connected with Make Taxes Fair, the conversation changed immediately. Not because anyone promised a miracle number. Because the team did something his previous preparers did not do. **They took the time.**

“*The specific problem I had when I came to you guys was, first, making sense and better understanding what could impact my tax liability, ways to save, different credits. I am a very in-the-weeds kind of person, and I wanted to know all of that — and why it applied to me, why something does not apply to me.*”

## WHAT ACTUALLY SHIFTED

### FROM A CLOSED BOOK TO A TEACHING RELATIONSHIP.

Between Tyler and Chris, Jeff finally found advisors who would walk him through the reasoning. Not just the number on the return, but the logic behind it. Not just the strategies that applied, but the ones that did not, and why.

This is what tax strategy looks like when it is done right. It is not a mystery solved behind a curtain. It is a teaching relationship. The business owner learns the rules of the game. The advisor points out which levers exist, which ones apply now, and which ones will matter later. Every conversation builds on the last.

**FOR A BUSINESS OWNER WHO HAD SPENT YEARS FEELING BEHIND, THAT SHIFT ALONE WAS WORTH THE MOVE.**

## JEFF ON THE TURNING POINT

“Between yourself and Chris, you guys took the time to do that for me. And that is kind of what sold me.”

## JEFFREY RUTKOWSKI · FOUNDER

## THE RESULTS · THE HONEST VERSION

# 03 NOT A MIRACLE NUMBER — A FOUNDATION THAT STICKS.

Most case studies end with a dollar figure. This one needs a little more context, and Jeff is upfront about that. His business was down this year and part of his income shifted as he stepped into a W-2 role, so the dollars were not there to save in the same way a stronger year would allow.

Jeff's business was down, his focus had shifted, and part of his income picture changed as he stepped into a W-2 role. The dollars were not there to save in the same way they might have been in a stronger business year. The value was not just in one year's outcome; it was in finally understanding the strategy, the opportunities, and what to do when the timing is right.

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|-----------|---|---|---|
| <b>01</b> | <b>PREPARER-HOPPING → A<br/>TEAM THAT STAYS</b>     | → | Jeff is no longer starting over every year with someone new. The relationship is continuous. The context carries forward.   |
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| <b>02</b> | <b>MYSTERY NUMBERS →<br/>UNDERSTOOD STRATEGY</b>    | → | The tax bill is no longer a surprise. Jeff can trace the reasoning behind every line — what drove the number, and what could move it in the future.   |
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| <b>03</b> | <b>“EVERY ROCK” →<br/>KNOWING WHICH TO<br/>TURN</b> | → | Jeff is no longer guessing whether his preparer is doing the full job. He knows what strategies exist in his line of work, which ones apply, and why others do not.   |
| <hr/>     |   |   |   |
| <b>04</b> | <b>REACTIVE FILING →<br/>STRATEGIC READINESS</b>    | → | The levers Jeff now understands are not all pulled yet. Some require the right opportunity and the right year. When those moments arrive, he will not be hearing about the strategy for the first time. He will be ready. |
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## JEFF'S ADVICE TO OTHER BUSINESS OWNERS

## HE WOULD NOT TAKE THE OTHER SIDE OF THE BET.

When Tyler asked Jeff what he would tell another business owner with a \$50,000+ tax bill who was on the fence, his answer was direct. That kind of recommendation only comes from a relationship where the trust has been earned, not promised.

THIS IS NOT FOR EVERYONE

# READY TO UNDERSTAND YOUR OWN **TAX STRATEGY?**

Make Taxes Fair works best with business owners paying **\$50,000 or more in annual taxes** who want to understand their own strategy, not just outsource it. Owners who value transparency, partnership, and legal, audit-ready implementation. Owners who would rather know the reasoning than be handed a bill.

## YOU'RE A FIT IF

- ✓ You're paying \$50k+ in annual taxes
- ✓ You want to understand your own strategy
- ✓ You value transparency & partnership
- ✓ You want legal, audit-ready implementation

## NOT A FIT IF

- ✗ You're looking for aggressive loopholes or shortcuts
- ✗ You want a preparer who files and disappears until April
- ✗ You'd rather be handed a bill than know the reasoning
- ✗ You don't want an ongoing relationship

If your tax bill keeps moving and nobody has explained why, if you suspect there are strategies in your industry that nobody has walked you through, you are not alone. Jeff was in that exact place. Then he was not. The first step is a conversation. No pressure. No obligation. Just clarity about where you stand and which levers are available to you.

## START A STRATEGY CONVERSATION

### VISIT

[maketaxesfair.com](https://maketaxesfair.com)

### FIRST STEP

No pressure. No obligation.  
Just clarity.

### THE PROMISE

Friends don't let friends  
overpay the government.