

# UNCLE KAM CASE STUDY 1

uncLEKam

**Tax Year:** 2023

**Filing Status:** Married Filing Jointly

**Occupations:** [Redacted] Business Owner & [Redacted]

## Overview

This client came to us earning over half a million dollars a year—but losing six figures to the IRS. Despite owning a business and having multiple deductions available, they were structured inefficiently and had no proactive tax strategy in place. After working with the Uncle Kam advisory team, we engineered a complete overhaul of their tax foundation.

## Before vs. After

	Before Implementing Tax Strategies	After Implementing Tax Strategies
<b>AGI</b>	<b>\$502,036</b>	<b>\$399,689</b>
<b>Total Taxes Due:</b>	<b>\$102,036</b>	<b>\$14,612</b>
<b>Net Tax Savings:</b>	<b>\$87,424</b>	
<b>Investment:</b>	<b>\$18,000</b>	
<b>ROI:</b>	<b>4.85x</b>	

## Deductions by Tax Strategy

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Tax Strategy	Deduction Amount
Entity Restructure	<b>\$62,000</b>
Retirement Plan Setup (401k + DB Plan)	<b>\$36,000</b>
Kids on Payroll	<b>\$24,000</b>
Business Use of Home	<b>\$5,000</b>
Augusta Rule	<b>12,000</b>
Vehicle Write-Off (Section 179)	<b>\$18,000</b>
Tax-Free Fringe Benefits	<b>\$9,000</b>
Advisory Implementation Fee	<b>\$8,000</b>

## Strategy Summary

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By restructuring their entity, layering in family-based payroll, and setting up a defined benefit retirement plan, this client reduced their AGI by over \$100,000 and shifted tens of thousands into tax-deferred buckets. We also added tax-free fringe benefits, Section 179 asset write-offs, and leveraged their primary residence for Augusta Rule rentals.

This was not just a tax return—it was a tax blueprint for long-term savings, compounding into future years.

### Client Result

This client invested **\$18,000** into their plan, slashed over **\$87,000** in taxes, and walked away with an IRS-compliant, audit-proof strategy they could use for years. “We were shocked at how much we were overpaying. Uncle Kam changed everything.”