

UNCLE KAM CASE STUDY 3

uncLEKam

Tax Year: 2018

Filing Status: Married Filing Jointly

Occupation: Real Estate Professional

Overview

This real estate investor had multiple properties, high W-2 income from a spouse, and growing cash flow—but their CPA never considered real estate professional status or advanced cost segregation strategies.

With no proactive planning, they were losing over \$129K in taxes. After partnering with Uncle Kam, we completely rewired their tax situation.

Before vs. After

	Before Implementing Tax Strategies	After Implementing Tax Strategies
Total Taxes Due:	\$129,963	\$21,940
Net Tax Savings:	\$108,023	
Investment:	\$24,000	
ROI:	4.50x	

Deductions by Tax Strategy

Tax Strategy	Deduction Amount
Real Estate Professional (REPS) Status	\$52,000
Short-Term Rental Strategy	\$16,000
Accelerated Depreciation (Cost Seg)	\$38,000
Tax-Deferred Retirement Contributions	\$12,000
Charitable Contributions Optimization	\$4,000
Augusta Rule	\$6,000

Strategy Summary

By reclassifying the client under REPS status, we unlocked the ability to offset active income using passive losses from their rental properties. We added cost segregation studies to accelerate depreciation, implemented short-term rental status for strategic exemptions, and added retirement contributions to reduce AGI. Combined, these allowed us to wipe out over six figures in tax liability—with complete IRS compliance.

Client Result

A one-time investment of \$24,000 in tax planning returned over \$100K in savings. And even more importantly, the strategies unlocked long-term advantages that will continue to pay off every year as they scale their portfolio.

“Our CPA never mentioned any of this. Uncle Kam gave us a game plan that saved six figures and set us up to grow faster.”