

UNCLE KAM CASE STUDY 8

uncLEKam

Tax Year: 2024

Filing Status: Head of Household

Occupation: Real Estate Agent

Overview

This real estate agent was crushing it in sales—but also crushing their own cash flow every April. Despite owning investment property, they weren't using depreciation, REPS status, or proper entity setup. After years of overpaying and fearing tax season, they turned to Uncle Kam. We helped them install a real estate-optimized strategy stack—and legally dropped their tax bill to \$0.

Before vs. After

	Before Implementing Tax Strategies	After Implementing Tax Strategies
Total Taxes Due:	\$7,320	\$0
Net Tax Savings:	\$7,320	
Investment:	\$2,000	
ROI:	3.66x	

Deductions by Tax Strategy

Tax Strategy	Deduction Amount
Real Estate Professional (REPS) Status	\$21,000
Home Office & Business Mileage	\$3,500
Retirement Contributions (IRA)	\$6,000
Depreciation of Investment Property	\$9,000
Entity Election (SMLLC Tax Planning)	\$2,000
Advisory Prep & Structuring	\$3,000

Strategy Summary

We reclassified the client under REPS status, which unlocked full depreciation deductions on their rental property. We added Augusta Rule strategy via business use of home, backed it with a simple entity structure, and helped them reduce AGI further through retirement contributions. Everything was documented, audit-proof, and 100% legal.

Client Result

They paid Uncle Kam \$2,000 and walked away with a \$0 federal tax bill—plus a repeatable system they can use year after year as their real estate income grows.

“I used to dread tax season. Now I look forward to it. Uncle Kam gave me the tools to win.”