



Tax Reduction Analysis - Elite Tax Package Case Study 1 - Client In Highest Tax Bracket

The following potential opportunities have been identified to reduce your annual tax burden:

This Year (Savings Compile Annually):

Shifting Income to Family Members working with Estate Attorney	\$ 60,000
Management Company for Investments and Other Business Income	32,000
Hiring your child and starting ROTH IRA for him/her	10,000
Cost Segregation Study For Real Estate	94,000
Maximizing Capital Losses with your Financial Planner	11,000
Removing Charitable Giving from Personal ownership (Phase Out Issue)	48,000
Maximizing Insurance (Life & Health) and Other Misc Items	9,200
Total Estimated Year 1 tax savings available to you (conservative/low)	\$ 264,200

1st Year Investment in your Strategic Tax Reduction Plan with LINZA \$ 21,500

After Tax Fees to LINZA (assuming 25% MR) \$ 13,545

Projected gain on your investment by April 2019 (net tax savings)	\$ 250,655	ROI 1850%
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Projected tax reduction over the next 10 years \$ 2,642,000

Projected tax reduction at death w/Estate Attorney Planning 300,000

Total Projected Savings (Conservative)	\$2,942,000
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Turn these opportunities into actual cash savings with a Strategic Tax Advisor & a Support Plan!

Visit linzaadvisors.com/servicepackages for details

** Savings are based on current effective tax rates, & do not account for future projected tax increases. To ensure compliance with requirements imposed by the IRS, we inform you that any U.S. federal, state or local tax advice contained in this communication (including any attachments) is not intended or written to be used, and cannot be used, for the purpose of (i) avoiding penalties under the Internal Revenue Code, state or local authorities or (ii) promoting, marketing or recommending to another party any transaction or matter addressed herein*