

# Fortune 500 Corporate Executive in Dallas, TX Saves \$262,000 In Taxes

## Results

A 2017 tax deduction of **\$730,000** from the real estate investment reduced the executive's tax liability by **\$262,000**, delivering a refund of over **\$252,000!**

## Background

A corporate executive with W-2 income of \$4,000,000. The executive had zero deductions available due to various phase-outs and limitations, was paying over \$1,500,000 each year to the government. Current debt payoff was a priority for the client, rather than long term savings and retirement strategies.

## Plan

Based on the client's preferences, cash flow needs, and budget, we designed their custom tax plan with:



a \$160,000 real estate investment opportunity, when properly administered, generates large annual deductions to offset wage income and is not limited by passive real estate investment rules