TAX EFFICIENT SOLUTIONS
Creating An Arbitrage

Fort Lauderdale, FL 33301
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CLIENT CASE STUDY

How a physician paying $800,000 a year in taxes found $200,000 in annual savings

CONTACT US

Our defined benefits specialist recently worked with a successful physician who believed his planning was complete. He had a trusted CPA, a financial advisor, and was already maximizing contributions to his existing retirement plans. Yet he was still paying more than **$800,000 annually in taxes.**

A deeper review uncovered additional contribution capacity through a specialized defined benefit plan strategy. After implementation, he realized approximately **$200,000 in annual tax savings** while maintaining liquidity for his growing practice.

> *The most interesting part wasn't the strategy itself. It was that the opportunity was uncovered after years of proactive planning and while working alongside his existing advisory team.*

Read the full case study below to see how the opportunity was identified and implemented.

READ CASE STUDY

WORK WITH OUR DEFINED BENEFITS SPECIALIST

Christian Calabro

SPECIALIST — DEFINED BENEFITS

Christian is a seasoned professional dedicated to shaping the future of the financial landscape.

His passion lies in adding substantial value and providing education to those around him. At the core of his work is a focus on innovation and delivering cutting-edge solutions that help businesses recapture tax dollars, seeking to ensure their continued growth and success.

Throughout his career, Christian has built a reputation for his ability to simplify complex financial matters and deliver tailored strategies aiming to maximize returns and minimize risks. His strong analytical skills and a deep understanding of market dynamics have enabled him to identify untapped opportunities and provide strategic insights that drive sustainable growth.

WORK WITH OUR DEFINED BENEFITS SPECIALIST

Could similar opportunities exist for your clients?

Many business owners assume they're already doing everything possible. Sometimes a second review can uncover planning opportunities that complement the work already being done by their CPA and advisory team.

If you'd like to discuss whether this type of planning may be worth exploring for your clients, we'd be happy to have a conversation.

SCHEDULE A FREE STRATEGY SESSION

DEFINED BENEFIT PENSION PLANS

HOW DO DEFINED BENEFIT PLANS WORK?

ADVANTAGES OF A DEFINED BENEFIT PENSION PLAN

VISIT OUR WEBSITE