

Learn how we created over \$2M per year in tax benefits for a client

CASE STUDY

Our team has a proven track record assisting our clients in increasing EBITDA and/or cash flow. During a recent engagement assisting a client with evaluating a portfolio company, we identified planning opportunities creating over **\$2,000,000** per year of tax benefit and generating over \$500,000 of tax refunds. Planning opportunities included restructuring business operations to more appropriately manage income and expense items, resulting in reduced state income and sales/use taxes. From a refund perspective, we identified federal and state income tax credits that our client was entitled to, but that were never taken by it on tax returns.

On another engagement we worked with a client to reduce its income tax compliance costs by over 25%, freeing up additional capital for strategic growth initiatives.

OUR TEAM

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