

# Successful Business Owners



Chris Shockowitz  
Tax Deferral Strategist  
COO Tax Deferral Strategies, LLC  
E: [Chris@DeferTax.com](mailto:Chris@DeferTax.com)  
P: (408) 203-8215  
A: [DeferTax.com/Chris](http://DeferTax.com/Chris)



**The More Successful You Are  
The More You Pay In Taxes...**

**Keep More Money Working for You!**

**Introducing...**

## **Business Owner's Tax Minimization Path**

1. Turn Your Tax Dollars into Real Estate Investments
2. Turn Your Business' Free Cash Flow into Retirement Savings
3. Reduce Your Taxable Income By Up To 30%
4. Lower Worker's Compensation Insurance Costs By Up To 50%
5. Lower Your Income Enough To Qualify for QBI (Another 20% Off)
6. Maximize Your Covid ERC Tax Credits

**Learn More**

# Who am I?

- I was a director in a fortune 20 company and managed a \$40 Million Budget
- I Own Four Businesses Today
- I've Done 5 Personal Multi-million Dollar 1031 Exchanges

And...

- I've Signed Big Checks to The IRS When I Did Not Have Too!

I've Learned The Hard Way How To Legally Pay Less Taxes To The IRS...

**Now I'm Sharing With You...**

# Business Owner's Tax Minimization Path

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**Keep More Of Your Hard Earned Money Working For You!**

## **How To...**

1. Turn Your Tax Dollars into Real Estate Investments
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# 1. Turn Your Tax Dollars into Real Estate Investments

## Help Revitalize America with Your Tax Dollars

How are my tax dollars turned into Real Estate Investments? Let's assume \$1 Million Income, 41% Tax Rate

### Year 1: Tax Deduction \$210,000 Tax Reduction on a \$200,000 Investment

- Min \$100,000 investment into a Historic Preservation Easement (we buy Historic Buildings)
- Gain \$2.5 tax deduction for every \$1 invested
- Rehab and Revitalize the building or business

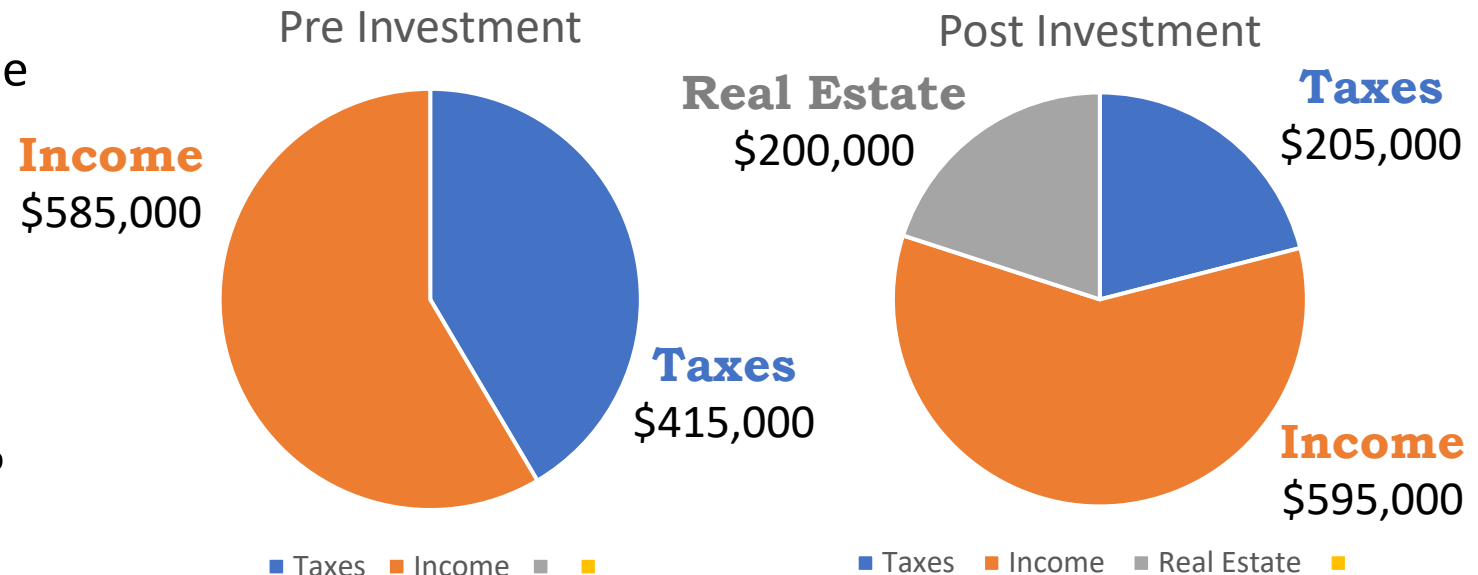
### Year 2 - 5: Cash Flow \$14,000 Annual Income

- 7% return on capital invested
- Taxable ordinary income

### Year 6: Liquidation Sell for \$220k - \$260k

- Return original capital investment
- Earn modest appreciation of 10% to 30%
- Only pay taxes on appreciation

### Income \$1 Million



# 2. Turn Your Business' Free Cash Flow Into Retirement Savings



## What Is A Defined Benefits Plan

A Defined Benefits Plan allows business owners to defer business income into a qualified retirement account for their employees and themselves. When combined with a Profit Sharing Plan, these plans can “shift” more money toward the business owners. A lot more. (Record so far is \$900,000 in one year)

## How Does A Defined Benefits Plan Work?

Depends on your

- Age
- Retirement Age
- Number of Employees
- Previous Years Income

### Here Is An Example

1 Owner, 19 Employees

	SEP	Cash Balance Plan	Floor Offset Plan
Benefit to Owners	\$66,000	\$200,000	\$300,000
Benefit to Employees	\$0	\$120,800	\$84,500

# 3. Reduce Your Taxable Income By Up To 30%



## What Is A Fee Simple Donation?

A Fee Simple Donation is a non-cash charitable contribution. By investing in a real estate partnership, every dollar you invest creates a \$5 charitable contribution for up to 30% of your taxable income.

## How Does A Fee Simple Donation Work?

Let's assume \$1 Million Income, 41% Tax Rate

Income: \$1,000,000

Fee Simple Investment: \$60,000

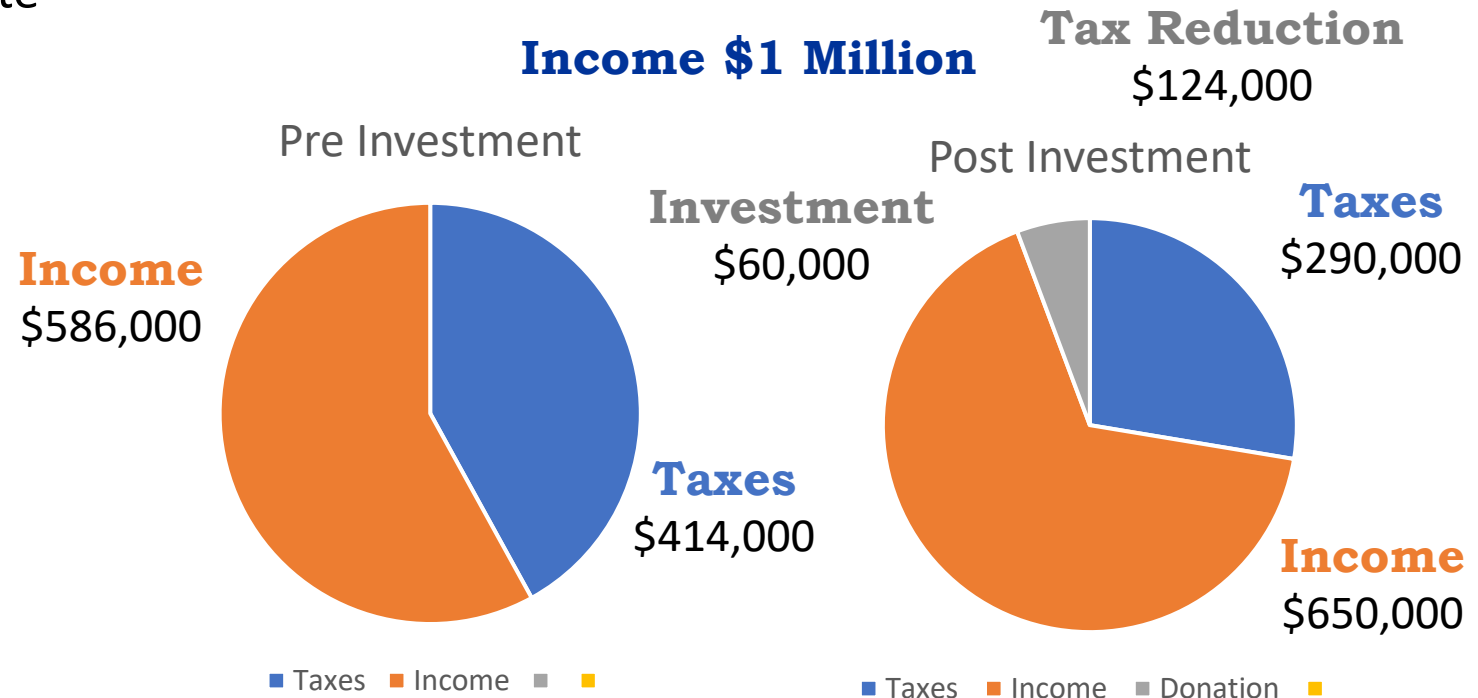
Tax Deduction: \$300,000

(\$60,000 \* 5 = \$300,000)

New Taxable Income: \$700,000

Tax Savings: ~\$124,000

Return On Investment: 207%



## 4. Lower Workers Compensation Insurance Premiums

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### **How Can I Lower Workers Compensation Insurance Premiums**

We have the legal team and insurance products that can lower your workers compensation insurance premiums by up to 50% depending on the size and nature of your business.

### **We can accomplish these results by...**

1. Elimination of Workers Compensation Insurance Brokers
2. Participatory employee wellness program leading to fewer claims
3. Comprehensive claims management reducing claims costs
4. Correct risk classification ensuring accurate premium pricing
5. Competitive insurance marketing place for excellent insurance at the best price

Our record cost reduction is over 65%.

The application process is free, and you pay nothing unless you want the service.

# TWO Additional Tax Minimization Options

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## 5. Are You Qualified for QBI 199A

The Qualified Business Income Deduction allows qualifying businesses (the business does not rely on a single person's skills – photographer, geologist, consultant...) to reduce their taxable income by an additional 20% if they meet certain income thresholds.

## 6. Maximize ERC Tax Credits

The rules for ERC Tax Credits have changed significantly and many businesses that made money, grew, or took PPP money still qualify for ERC tax credits. Our firm has one of the lowest rates, starting at 10% of cash recovered, and we do all the work for you.

## We also have...

- 34 additional tax minimization options you may qualify for
- Full Business Structure Design Services (LLC, S-Corp, C-Corp, Trusts, and when/how to use each)
- Full Estate Planning and Legacy Planning Services (To Protect and/or Grow Your Wealth)



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**If you'd like to learn more, contact me at**

**DeferTax.com/Chris  
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