MEDARI ADVISORS
TAX & ACCOUNTING

CASE STUDY

Dr. Lauren K., DDS

Broken Arrow, OK

FULL SERVICE DENTISTRY

FROM REACTIVE FILINGS TO INTEGRATED STRATEGY

The Problem

Dr. Lauren owned a thriving dental practice but had no integrated strategy tying together entity structure, real estate holdings, and retirement planning. Her returns were filed properly, but multiple business interests were operating independently of each other, leaving significant tax exposure on the table. She was earning well, but overpaying.

What We Did

We conducted a comprehensive review of her personal, practice, and real estate situation and built a coordinated plan focused on restructuring, optimization, and long term efficiency.

The goal was not to introduce complexity. The goal was to introduce structure.

Tax Plan Results

The savings were identified across multiple areas, including entity restructuring, real estate tax strategy, retirement optimization, and overall income strategy.

The result was a fully integrated plan designed to reduce tax exposure while strengthening long term financial positioning.

Estimated annual tax savings:

Effective tax rate: **33.98% → approx. 22-25%**
Estimated annual tax savings: **$373,896***

The Takeaway

- Lower overall effective tax rate
- Unlocked previously suspended losses
- Increased retirement contributions
- Improved annual cash flow
- A clear, proactive roadmap instead of reactive filings

Free, confidential income tax review for pharmacy and healthcare owners.

*Results reflect a complex, multi-entity situation and are not typical of all clients.

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