

Marsh Family Pharmacy

Lafayette, LA

INDEPENDENT PHARMACY OWNERS

OWNER: STEVEN & DIANE MARSH

A DOZEN SMALL MOVES, ONE BIG RESULT



The Problem

Steven and Diane were running a profitable pharmacy with clean, accurate returns filed every year. But nothing was tying together their retirement planning, compensation structure, and day to day deductions. They had a return. They didn't have a plan. They were earning well, but leaving money on the table year after year.

Tax Plan Results

The savings were identified across multiple areas, including retirement plan contributions, S corporation compensation, R&D credit eligibility, accountable plan reimbursements, and employee fringe benefits.

The result was a fully coordinated plan built around their pharmacy and their household, not just their return.

Estimated annual tax savings:

\$49,415

What We Did

We conducted a full review of their pharmacy's financials and personal tax situation and built a coordinated plan covering owner compensation, retirement contributions, and everyday deductions most owners miss.

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

The Takeaway

- Lower overall tax liability
- Increased retirement contributions
- Reduced payroll tax exposure
- Formalized reimbursement and benefit structures
- A clear, proactive roadmap instead of reactive filings

**Free, confidential income tax review
for independent pharmacy owners.**

*Owner names have been changed to protect financial data.
Tax plan results are factual.

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