

WellSpring Pharmacy

Overland Park, KS

INDEPENDENT RETAIL PHARMACY
S CORPORATION
OWNER: STEVEN PARKER



The Problem

Steven Parker was working with a local CPA but received little communication and no tax planning. Tax returns were prepared, but no ideas were discussed and no forward planning was provided.

What We Did

Our team analyzed Steven's last three years entity returns and personal returns. Then created a written tax plan covering both the pharmacy and the owner capturing future tax savings. See "Tax Plan Results".

Tax Plan Results

The savings were identified across multiple coordinated areas, including retirement planning, available tax credits, family compensation structure, income timing strategies, and real estate related planning.

Estimated annual tax savings:
\$15,858

The Takeaway

The savings came from coordination and planning, not a single tactic. The written tax plan gave Steven clarity before the year closed, not after.

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

*Owner name and pharmacy name have been changed to protect financial data. Tax Plan results are factual.

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