



CLIENT CASE STUDIES

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CARDIOLOGIST SAVES \$30K/ YEAR

Disclaimer: All names of business owners and companies have been changed to protect client confidentiality. Actual performance and outcomes remain accurate, with identifying details anonymized for privacy.

Results Summary:

\$90,000

in tax refunds

Optimized Multi-Income & Real
Estate Strategy

Full Family-Focused Tax
Planning Across Years &
Entities

Situation

Beto and Rita Sánchez’s Florida-based business was navigating rapid financial growth. Beto, a cardiologist, earns income through both a salary and 1099 contracting, while Rita operates a successful business selling medical uniforms.

Together, their income has climbed from \$500K to \$800K, with projections surpassing \$1MM in 2025. They also recently purchased real estate in 2025, creating opportunities to leverage depreciation benefits for further tax efficiency.

Challenge

- High tax burden due to multiple income sources.
- Missed deductions across consulting and business operations.
- No depreciation claimed on new property.
- Lack of proactive, integrated tax planning aligned with family goals.

Our process

- **Tax Amendments:** Reviewed and amended 2022–2024 returns to recover \$90,000 in overpaid taxes (~\$30K/year).
- **Entity & Structure Optimization:** Adjusted reporting for 1099 income and small business operations.
- **Real Estate Strategy:** Applied depreciation strategies on newly acquired property.
- **Proactive Planning:** Built forward-looking strategies to manage \$1MM+ income, reduce future liabilities, and align tax savings with family priorities (e.g., college tuition).

Impact

The Sánchez family achieved a cash recovery of \$90,000 through amended returns, while optimizing their ongoing tax strategy across multiple income streams. These savings will cover their children's college tuition and provide increased liquidity to reinvest in property improvements, business growth, and other family priorities.

Results



- Proactive plan in place for \$1MM+ income in 2025.
- New property leveraged for deductions and depreciation.
- Family-focused tax strategy fully aligned with financial goals.

