SKALA ADVISORY | **Strategic Tax Advisory**
Tax Planning | Capital Efficiency | Business Advisory
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STRATEGIC TAX ADVISORY

Helping successful individuals and business owners preserve wealth through strategic, compliant tax planning—creating greater after-tax capital for opportunities that matter most.

Why Clients Engage

Many clients initially seek help with tax preparation. Along the way, they realize the greatest opportunities to preserve wealth are created before a return is prepared - through planning, structure, and informed decisions.

My goal is to help clients make better financial decisions before tax consequences become unavoidable.

Strategic Tax Planning

Compliance accurately reports what has already occurred. My legal training allows me to evaluate decisions before they occur, coordinating structure, timing, implementation, and execution.

Tax returns report outcomes. Strategic planning improves them.

Independent Advice

I do not manage investments, sell investment products, or receive compensation based on investment decisions.

My role is to help clients identify lawful tax strategies that improve after-tax cash flow and increase capital available for investment, business growth, real estate, and other opportunities they choose.

Advisory Impact

For successful professionals and business owners, taxes are often the largest controllable expense. A disciplined planning process can reduce current tax liability, improve cash flow, and support long-term wealth accumulation.

Looking beyond the tax return is a key step in creating a proper roadmap for effective financial decisions.

Objective: to be a trusted advisor whose value materially exceeds the cost of engagement year after year.

How the Advisory Relationship Works

Strategic Review

Every engagement begins with a complete understanding of the client's financial picture, priorities, and upcoming decisions.

The review considers:

- Income structure and capital allocation
- Business activities, accounting methods, and entity structure
- Real estate, farm, ranch, and agricultural opportunities
- Liquidity, retirement planning, wealth transfer, and future transactions
- Planning priorities, implementation timeline, and desired level of involvement

Strategic Tax Blueprint

Following the Strategic Review, I prepare a Strategic Tax Blueprint outlining opportunities, implementation priorities, expected economic benefits, and the recommended scope of ongoing advisory support.

Together, we tailor the advisory relationship to your objectives and desired level of involvement.

Tax Compliance

Tax preparation and filing remain important and are billed separately based on complexity.

Advisory services are designed for proactive planning throughout the year, not reactive reporting after year-end.

Commitment

Success is not measured by the number of tax returns prepared, but by the value created for each client.

- Wealth preserved and taxes legally minimized
- Increased after-tax capital and better-informed decisions
- Structures aligned with client objectives, long-term value, and wealth preservation

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