

## Case Story: Technology Executive Post-Acquisition Payout



REDIRECTED  
**\$450k**  
PER YEAR

MORE THAN  
**\$570k**  
SAVED

Ray was a senior level sales executive who, post acquisition, successfully exited from his technology company employer with a very large stock option package and K-1 income. His wife is also a high income W-2 tech executive.



The couple lives in the Los Angeles area. To mitigate their federal and California state income taxes, the couple established an LLC in 2020 and redirected their tax payments to purchase \$400,000 in solar assets.

Based on the success of their initial solar asset purchases, they have since redirected \$400-\$450,000 each year, for \$1.9 million in total solar investment with no impact on their household cash flow. On average, they have realized a 30% overall tax savings on every dollar they would have otherwise given to the IRS and state of California, for a total of \$570,000 in tax savings.

Now in their fifth year of solar tax credit strategy participation, with Inception managing the performance of their solar installations on their behalf, Ray and his wife have had a problem-free solar ownership experience. They also speak highly of Inception's collaboration with their CPA to make it simple to complete their tax filing and secure their tax credits and depreciation.