

REDIRECTED
\$350K
IN TAX
PAYMENTS

SAVED
\$130K
IN TAXES

Walter is a senior sales executive who took a substantial distribution from a fintech firm following a fundraise. To protect his wealth, he began pursuing a variety of strategies to reduce his tax burden, including relocating from California to Texas to eliminate state taxes. On the federal side, he was looking for a business opportunity that had the potential to mitigate his tax burden through some combination of tax credits and write-offs, and deliver future returns. A former colleague introduced him to Inception as a firm specialized in helping its clients establish businesses that transform tax liability into tax equity.



Walter established his LLC in 2022 and began to build his residential solar portfolio. To date he has redirected \$350,000 in tax payments to purchase solar assets, generating more than \$130,000 in net tax savings.

- In 2022, he redirected \$120,000 of his tax payments into solar asset ownership, achieving \$40,000 in tax savings.
- Building on this initial success, Walter increased his investment to \$175,000 in 2023, resulting in \$70,000 in tax savings.
- In 2024, he redirected an additional \$63,000, saving \$23,000 in taxes.

“Inception provided me with what you might call a business ownership template, as well as command of the knowledge I need to run my own solar asset management business,” Walter said. **“The benefits I’ve received as a client extend beyond just the tax credits and depreciation – the business ownership education they’ve provided has also been meaningful to my career. Between the tax savings and the business experience, I’ve had such a positive experience that I’ve recommended Inception to a number of friends and colleagues, and helped them sign up and get their solar asset ownership business started as well.”**

To maximize his tax benefits, Walter’s CPA has taken advantage of Inception’s CPA services, including setting up direct access to Walter’s client portal to streamline document management and tax filing.