

## Case Story: Technology Executive Post-Acquisition Payout



REDIRECTED  
**\$450k**  
PER YEAR

SAVED  
**\$570k**  
IN TAXES

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 energy assets.

Based on the success of their initial asset purchases, they have since redirected \$400-\$450,000 each year, for \$1.9 million in solar and energy storage projects 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 energy tax credit strategy participation, with Inception managing the performance of their solar and energy storage assets on their behalf, Ray and his wife have had a problem-free 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.