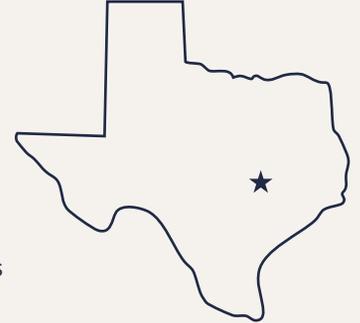




REDIRECTED  
**\$350K**  
IN TAX  
PAYMENTS

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 a solar and energy storage portfolio. To date he has redirected \$350,000 in tax payments to purchase assets, generating more than \$130,000 in net tax savings.

- In 2022, he redirected \$120,000 of his tax payments into energy 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 energy 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 energy 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.