

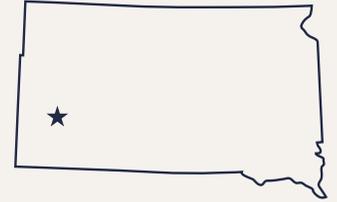
Case Story: Retail Business Owner Leverages Post-Sale Tax Credit Carry Back

REDIRECTED
\$3M
IN TAX
PAYMENTS

SAVED
\$1M
IN TAXES

In 2022, Douglas sold his South Dakota-based equipment rental business, resulting in a significant tax bill on the sale proceeds.

In 2024, he began to participate in Inception's energy asset tax strategy because it offered him a unique opportunity to reclaim a portion of the taxes he had already paid.



Douglas first purchased enough qualifying assets to offset his 2024 tax liability. He then strategically acquired additional assets, generating enough credits to carry back three years — first to 2021, then to 2022 — triggering a substantial refund for taxes paid on the sale of his business.

In total, Douglas redirected \$3 million in tax payments toward the purchase of residential solar and energy storage projects across Texas. This approach produced \$1 million in tax savings, representing a 33% reduction.

Now in his second year with the program, Douglas is expanding his energy asset portfolio with Inception to maximize annual savings. As a lifelong entrepreneur, creating an energy asset ownership LLC was a natural next step.

His positive experience led him to refer his brother, who launched his own energy asset ownership business in 2025 and began purchasing assets this year.

As part of our business advisory services, Inception collaborates directly with the family's CPA to ensure seamless tax filing, optimal credit utilization, and professional asset portfolio management for worry-free operation.