

LAEL TAX

— PLANS —

5 TAX REDUCTION STRATEGIES SAVVY ATTORNEYS ARE USING TODAY (You Can Too!)

➔ **BONUS:** Learn how you can stop the losses and implement these strategies NOW for maximum savings!



Christina Lael, CPA, JD
CEO & Founder, Lael Tax, Inc
www.LaelTaxPlans.com

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Specializing in Strategic Tax Planning

Just A Few Of Our Satisfied Clients



And Hundreds More Enjoying Thousands In Tax Savings Every Year!



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Disclaimer

- The following program is intended to communicate our best practices used in legal tax planning.
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Introduction:

“Create financial freedom that you and your family deserve. We legally reduce your taxes from paying an unfair amount to a fair amount.”

**Who is Christina Lael,
CPA, Esq.?**

Seasoned Tax Attorney for Attorneys



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About Christina:

- ➡ Received CPA License in 2002
- ➡ Graduated the Nashville School Of Law
- ➡ Admitted to the Tennessee Bar Association in 2011
- ➡ Worked in the Tax Department at a Fortune 500 company for 10 years
- ➡ Started her own company to pursue her passion of helping clients achieve tax savings
- ➡ One of 60 Tax Coaches certified by the American Institute of Certified Tax Planners™
- ➡ Co-author of “Thinking Outside The Tax Box” available on Amazon



Christina Lael, CPA, JD

I Help Law Firms, Attorneys, Partners, & Business Owners Save An Average Of \$52,750 Per Year In Taxes 🏆 Top US Strategic Tax Planner, Licensed CPA, Tax Attorney

United States · Contact info

21,754 followers · 500+ connections



And
More!



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I specialize in helping attorneys and law firms save money in taxes



I am a CPA and Tax Attorney who focuses on tax planning for attorneys by using basic and simple tax saving strategies. I will show you some of these easy and simple strategies, which are clearly allowed by the tax code.

We can implement ONE simple, customized tax plan for you which you can use every year to save money in taxes for the rest of your working career. When added together, you can save at least tens of thousands of dollars in taxes every year.

We have hundreds of attorneys as clients and have been doing this for over a decade. I am THE Tax Attorney for attorneys and law firms.

You may continue to use your current accountant to prepare your tax returns. We also offer this service to ensure your strategies are reflected on your tax return.

How It Works

With these strategies, you are able to deduct expenses you already have WITHOUT the need to spend more money, unlike other strategies that require you to increase your spending to create additional tax deductions.

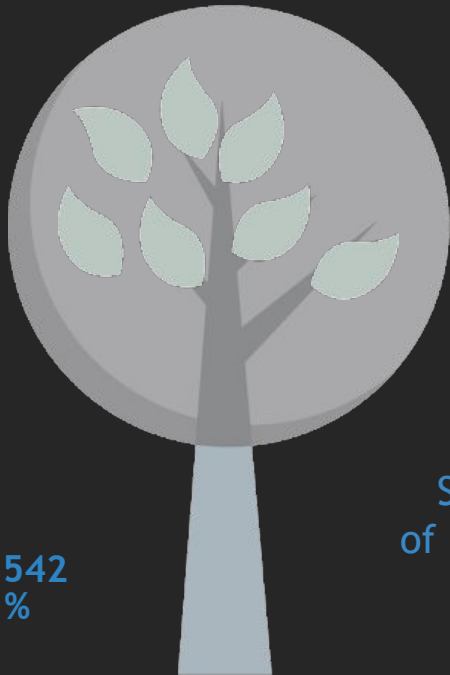
We will reveal strategies to pull money out of your firm
TAX FREE-my favorite tax rate of 0%!

Why doesn't my CPA or Accountant know all of this?

- They are NOT tax attorneys who study the tax code and the tax court cases. It is very difficult to find a tax attorney who will work with you for under \$20K+ per year.
- Most CPAs and Accountants offer several types of services and enter your numbers into a tax software that will spit out a return that the IRS is more than happy to accept.

Other
CPA's

TOTAL INCOME: \$ 300,000



\$63,542
21%

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TOTAL INCOME: \$ 300,000



Savings
of \$30,024

\$33,518
11%



= basic deduction



= tax savings strategy

*Based MJF, filing Sch C, 2 children and NO STATE TAXES. For Illustrative Purposes Only

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Tax Saving Strategies:



Entity Structure

The best way to set up your company to reduce your taxes, even if it has already been established

Home Rental

The one secret way to correctly rent your home out to your business for maximum tax savings

Family Management Company

Why the wealthiest people in America all have one and how it can save you money in taxes

Hiring Children

The one secret way to hire children of any age to save money in taxes

Medical Expense Reimbursement Plan

Save even more in taxes by deducting medical expenses

Accountable Plan for Reimbursements

Maximize tax savings with other deductible expenses



= basic deduction



= tax savings strategy



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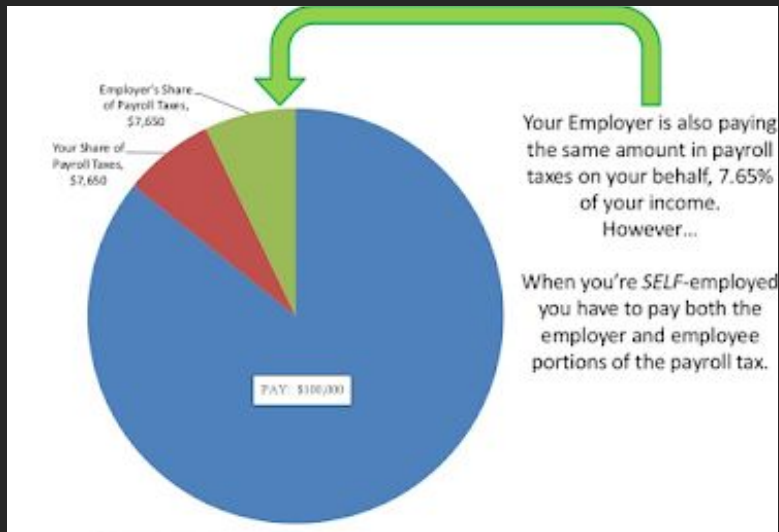
Entity

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Self Employment Taxes



15.3% ($7.65\% \times 2$) or \$25,796 of taxes up to \$168,600 for 2024

3.8% on all income over \$168,600.

This is **IN ADDITION TO** your ordinary income taxes.

What you pay since your business is taxed as a partnership (form 1065) or files a Schedule C

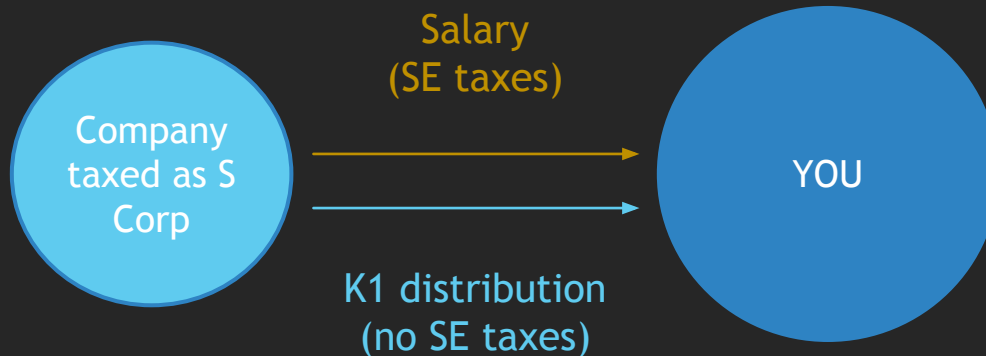
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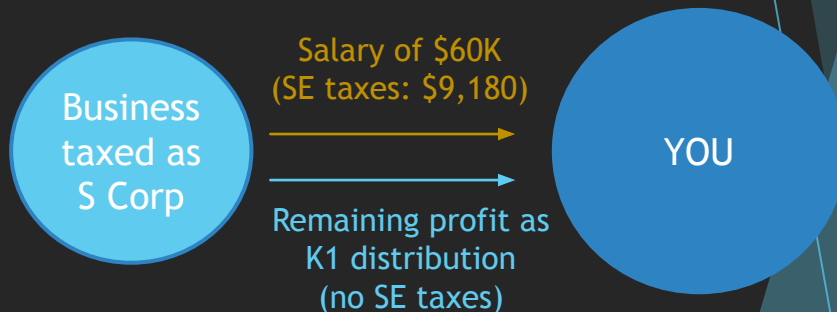
Self Employment Taxes and S Corporation

- The total self employment tax rate is **15.3%** ($7.65\% \times 2$) or \$25,796 of taxes up to \$168,600 for 2024 and **3.8%** on all income over \$168,600. This is **IN ADDITION TO** your ordinary income taxes.
- S Corporation can reduce self employment taxes with a low salary determined by
 - Reasonable Compensation Survey OR
 - Net profit



Create entity (if necessary) and elect to tax company as S Corp

- If necessary, create an entity in your state if you do not already have one. Elect to tax your entity as an S Corp.
- Reasonable salary survey
 - Your proficiency is completely subjective. Rate yourself low to lower your salary since you have many other tasks.



Projected Tax Savings with \$60K salary: \$14,805

<https://www.irs.gov/businesses/small-businesses-self-employed/s-corporations>



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Home Rental



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Home Rental



- Deduct as \$28,000+ RENTAL EXPENSE.
- Separate from a home office expense which can still be used.
- We will provide a rental contract, how to properly and easily substantiate the rental amount, and show you how to record this in your tax return.

Projected Tax Savings: \$5,363



Internal Revenue Code §280A(g)

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Family Management Company



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Family Management Company (FMC)

- Used for:
 - Medical Expense Reimbursement plan (MERP)
 - Hiring Children
- Create an LLC for you as a Family Management Company.
 - Wholly owned by active participant
 - House consulting work that you are already doing



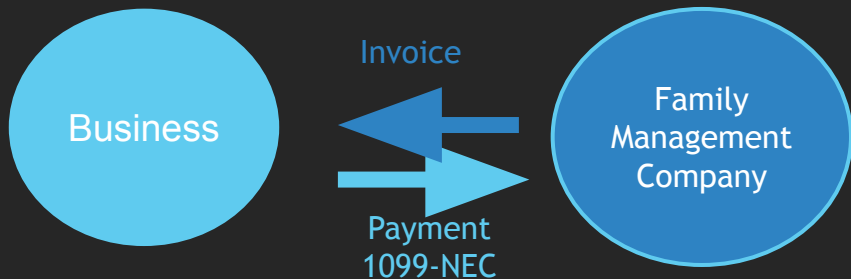
Internal Revenue Code §704(e)

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Family Management Company (FMC)

- Bill business for management services
 - Transfer money to cover expenses on next slides
- Income will be eliminated by expenses on the following slides.
- We will show you:
 - How to file 1099-NEC easily
 - Create Formation docs: Operating Agreement and Consulting contract.



Internal Revenue Code §704(e)

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Hiring Children



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Hiring Children: if under 18



- Hire your children via Family Management Company
- We will show you the absolute easiest way to do this and to pay them the most money. We will create the employment contract(s).
- If paid \$14,500 or less the child does not pay taxes and files no return.
 - Use to pay for babysitters, daycare, education, travel and extracurricular activities. Save for college/car or contribute to Roth IRA

Estimated Tax Savings per year with 2 children: \$5,104



Reg. § 31.3121(b)(3)-1

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Hiring Children in College



- Hire your children who is in college.
 - We will show you the absolute easiest way to do this and to pay them the most money. We will create the employment contract(s).
- Pay them what their education costs
- Pay them as a contract worker by writing them a check. They will pay for their own educational expenses.
 - MUCH Lower tax rate
 - His/her taxes will be reduced by education credits that you don't get!





Medical Expense Reimbursement Plan (MERP)



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Medical Expense Reimbursement Plan (MERP)



- Hire spouse, child or yourself in Family Management Company as a consultant.
- Spouse's compensation will be a Medical Expense Reimbursement Plan (MERP).
- Deduct your medical costs
 - Premiums, co-pays, prescriptions
 - Long Term Care Insurance
 - Chiropractor
 - Massages if recommended by doctor/chiropractor
 - Supplements
 - Any other medical expenses

\$12,000
deduction

Projected Tax Savings: \$2,112



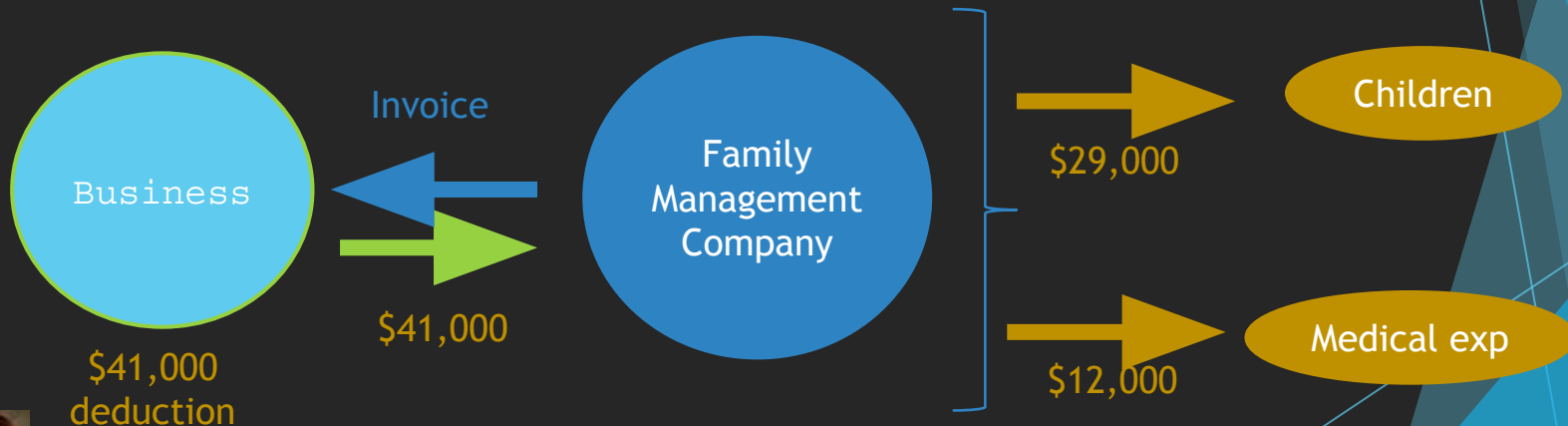
Internal Revenue Code §1.105

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FMC: transfer of money

- Transfer enough money to your FMC to cover the following YEARLY costs by the end of the year:
 - \$29,000: hiring children
 - \$12,000: approximate medical costs



$$\$41K \text{ Income} - \$41K \text{ Expenses} = \$0$$





Other Deductions Vehicle and Vacation



Vehicle Deduction



- Reimburse yourself under an accountable plan.
- Keep track of mileage with Lael Tax app (download for free!).
- We will explain how to correctly and most easily document and deduct vehicle expenses and how to report this expense on your tax return.
- We will create the accountable plan necessary to implement this strategy.
- You can also possibly deduct the full amount of your vehicle's purchase even if you finance.
- If you have \$10,000 of expenses

Projected Tax Savings: \$1,760



IRS Reg Sec 1.62-2(d)(1), which allows as reimbursements the expenses in part VI, subchapter B, chapter 1. Home office deduction rules: Code Sec. 280A, Code Sec. 262(b)

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Vacation Deduction



- Reimburse yourself from your businesses under an accountable plan
- You spend an average of **\$5,000** yearly on vacations.
- We will show you how to easily deduct vacations.
- We will produce the instructions and the documents needed to deduct this.

Estimated tax savings: **\$880**



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IRS Reg Sec 1.62-2(d)(1), which allows as reimbursements the expenses in part VI, subchapter B, ch 1 of the IRS Code

Summary of Tax Savings



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Summary of Tax Savings

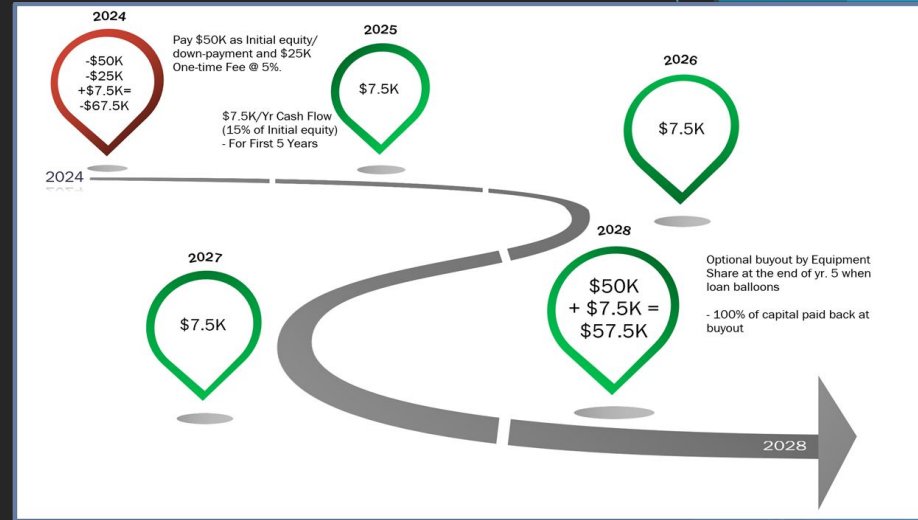
Strategies	1 Year Savings	5 Year Savings
S-Corporation	14,805	74,025
Home Rental	5,363	26,815
Hiring Children	5,104	25,520
MERP	2,112	10,560
Vehicle Deduction	1,760	8,800
Vacation Deduction	880	4,400
TOTAL SAVINGS:	30,024	150,120



Example of more advanced strategies

Equipment Leasing Strategy/Sale-Leaseback Program

- Enter into a revenue-sharing agreement with large construction equipment company which rents out equipment for you. Approve weekly emails and subscribe to magazines
- Pay a 10% deposit and a one-time 5% fee. Finance the remaining 90%.
- Receive for the first 5 years: 15% of your initial investments.
- Receive Bonus Depreciation for 60% deduction in year 1 plus Regular Depreciation of 10%.



With a contribution of \$50,000 (Investment of \$500,000. 60% B/D and R/D of \$300K) and one-time fee of \$25,000 ($\$500,000 \times 5\%$)

+ Estimated Tax Savings: \$180,000

TOTAL SAVINGS: \$105,000



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Some common questions I get asked...



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Q: Will your strategies cause an audit risk?

A:

I use strategies found in the tax code. They are simple strategies that are incredibly effective. Your Strategic Tax Plan provides all the necessary documentation and implementation. It is not an issue if you work with the correct Tax Attorney.



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Q: How can you help me if you're in a different state?

A:

I have clients all over the United States. Under my CPA hat, I can file federal and state taxes all over the US.



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Q: Can I wait until the end of the year for tax planning.

A:

NO! These strategies need to be implemented as early in the year as possible to take full advantage of them all. If early enough in the year, you could use the home rental strategy for the previous year.





Do you have any other testimonials?

Yes! You can visit my website www.LaelTaxPlans.com and click on the *Success Stories* tab. Click on each person's picture to visit their LinkedIn page.



Evan Farr
| Certified Elder Law Attorney

"I am immensely grateful to have found and become a client of Lael Tax, LLC. With Christina's amazing legal and tax expertise, my wife and I have been able to save literally hundreds of thousands of dollars in taxes per year, wildly exceeding all of our expectations."



Anne Tyler Hall, JD, LLM
| Attorney

"Christina and her team has been able to drastically reduce our tax liability and set us up on an incredible plan to build tax free wealth. She and her team always answers our questions quickly, take the time to listen to what we need, and they can for and beyond to."



Jon Lewis
| Attorney &
President of Lewis & Feldman, L

"Thank you, Christina, for all your help with... appreciate the fact that you know the tax law and save us money in taxes and provide all the support needed to back it up."



Craig Renard
| CEO

"Wow! I am amazed at how much I saved in taxes once I contacted Christina!"



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Christina, how do I work with you
to receive my own customized
Strategic Tax Plan?



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Work With Me In 5 Easy Steps!

It is so **EASY** to work with me—we do **99%** of the work while you relax and **SAVE!**

1. Book a complimentary Strategic Tax Planning Session (a \$500 value) to see how much you can save.
2. Choose to proceed with your Customized Strategic Tax Plan.
3. Provide a couple tax documents and complete a brief survey. We will then create your tailored plan.
4. Schedule your “Big Reveal” to review your Customized Strategic Tax Plan.
5. Our team implements the plan, and you start saving in taxes right **IMMEDIATELY!**



Meeting With Christina

Schedule a meeting with me to discuss your own customized
Strategic Tax Plan...

First Meeting Is FREE

\$500 value!

IF you schedule in the next 24 hours, your first meeting is complimentary. After 24 hours, the price will be \$500.



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Important Information About These Strategies:

- We can implement ALL these strategies for you in 2 weeks.
- Your role is incredibly easy and simple.
- INCREDIBLY affordable cost of your Strategic Tax Plan, is tax deductible, and a TINY fraction of what you will save in taxes in the FIRST YEAR.
- You only pay half upfront and half once I present your tax plan.
- There are many other strategies than the ones I will present.
- I can help you save money in taxes in your particular circumstance and however you are paid.
- I can help other people who are not attorneys.

Meeting With Christina

- Talk to Christina about your own customized tax plan.
- These strategies and more advanced strategies will be included.
- ONE TAX PLAN WE IMPLEMENT FOR YOU. YOU USE EVERY YEAR.
- My average savings is **\$52,750/client** up to hundreds of thousands of dollars in savings.
- Tax Plans are a one-time cost (Not yearly) and are a FRACTION of what you will save IN JUST ONE YEAR!
- **Prices will increase next month.**
- LINK TO SCHEDULE MEETING: [GO HERE](#)
- Email us with any questions: support@laeltaxplans.com



Other “Tax Planners”

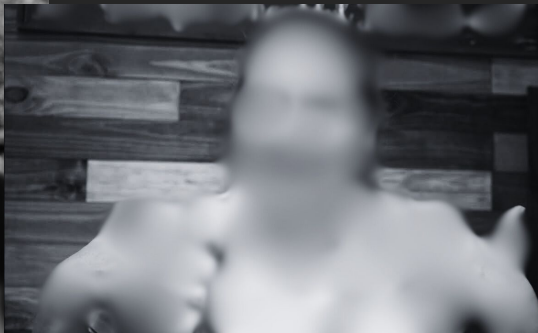
Others in the space are ridiculously priced as high as \$20,000, \$50,000, or as much as \$100,000 for a single tax plan!

Our Tax Plans Are Just A Fraction Of This & A Small Portion Of Your 1st Year Tax Savings!



\$50,000+

Tax Planner & Tax Attorney
(No implementation included)



\$20,000+

Tax Planner & Former IRS
Employee



FRACTION OF THE COST

Strategic Tax Planner, Tax Attorney, & CPA
(ALL implementation included)

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Thanks For Attending!

➔ If you have any questions please email us at support@laeltaxplans.com

➔ To speak with one of our team members and book your session with Christina, please visit this link: [Get Started Here](#)

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