

The “other guys” offer “see you next year” service, with limited contacts except at tax time. (And invoices for phone calls and even emails!) Certified Tax Coach, LLC offers ongoing support. That means year-round contact, support, direction, and accountability.

### What’s the bottom line?

- We empower you to achieve your dreams.
- We educate you in a language you understand – (we save the CPA gobbledy goop for all those lively CPA membership club meetings)
- We highlight areas in which you are strong and those that need improvement
- We help you set goals and help hold you accountable to achieve your dreams
- We design and help you implement innovative, customized tax strategies that minimize your taxes and your risk of audit

### Personalized Proactive Tax Strategy

- You start with a brief interview with a Client Consultant. We want to hear about where you are now, and where you want to be.
- You’ll complete our brief Tax Questionnaire. This is where you tell us your financial, business and investment goals and where your money currently goes.
- This is the stage where the cool things happen! In fact, the average savings for a taxpayer as a result of their Tax Strategy plan was over \$14,000 per year!
- You get a written strategy plan, along information on all available deductions, credits, loopholes, and strategies.



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## PROACTIVE TAX PLANNING

*Here Is How to Beat the IRS Legally!*



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## To minimize your taxes, you need a plan.

You need concepts and strategies that leave more on your bottom line, without raising “red flags” or straying into “gray areas.”

It doesn't matter how good your current accountant is with a stack of receipts on April 15. If you haven't planned right, by April 15 it's just too late.

Have you organized your business, right? Do you have the right benefit plans for yourself and your employees? Do you have the right retirement plan to prepare for your future? Are you taking advantage of all the legitimate deductions, credits, loopholes, and strategies the tax code offers?

We partner with business owners and investors throughout Southern California. We have the experience -- and more important, the proactive attitude -- to give you more than just a history lesson.

## Has your accountant Answered all of these questions?

- Are you making the single most expensive tax mistake of all?
- Do you know how to slash your audit risk?
- Do you have the right structure for your business?
- Do you have the right retirement savings strategy?  
Are you making the most of meals, entertainment, and gifts?
- Are you making the “mileage allowance” mistakes that cost thousands!?
- Can you write off your family medical bills as a business expense?
- Can you deduct funds for your kids' private school and college tuition?



## What Would You Do with \$15,000?

Ron came to us after he bought a small rental property down the street from his home. He bought the property because he heard it would be a great tax shelter. But he was frustrated because he didn't see how it was helping him.

After one strategy meeting, we discovered the problem. Due to income limitations in the tax law, Ron couldn't deduct his rental, and they remained “suspended.” We also found that he had quite a bit of equity built up in his home and rental that was not being used.

We developed a plan for Ron to use tax loopholes to his advantage and deduct those real estate losses against his other income. He also repositioned some of the equity in his home to buy more properties, creating even more deductions. In just one year, we created over \$50,000 of tax free income to Ron and cut his tax bill by over \$15,000!

## Life and Taxes!

If you run your own business or manage investments, you rely on information. Information on products, markets, and customers. Information to make money. And information to keep money.

You rely on your accountant for some of your most important information. But what does your accountant actually do with that information?

At tax time, your books tell your accountant how much tax you owe. You scramble for more receipts and more deductions. But by tax time, it's usually too late to do anything more.

Most accountants do a fine job recording history – the history you give them! They compile monthly, quarterly, and annual books and records. At tax time, they put the “right” numbers in the right boxes on the right forms, and file them by the right deadlines. But then they call it a day.

## Is that all you really want?

## How Are We Different?



My name is Rafael A Carmona. I started Certified Tax Coach, LLC to offer a different kind of service. We don't just record the history you give us. We go beyond, to give you proactive advice and strategies to help you earn more and keep more.

I'm different because I'm a “Certified Tax Coach.” I give you a proactive plan full of court-tested, IRS-approved strategies for minimizing your taxes.

The “other guys” settle for after-the-fact planning. Too often, that means outdated information, nasty surprises on April 15, and no feeling of control. Certified Tax Coach, LLC gives you ongoing coaching and proactive solutions. You enjoy total confidence knowing you pay the least amount of tax possible while you work to achieve your dreams.

The “other guys” offer the same old solutions, year after year. That means paying too much tax! Certified Tax Coach, LLC gives you customized strategies. You profit from personalized solutions for your situation that reduce your tax.

The “other guys” offer business as usual. Certified Tax Coach, LLC gives you flexible planning. You enjoy complete certainty that you're making the right decisions for your business.