



# CLIENT CASE STUDIES



Results Summary:

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**\$700,000**

in tax benefits unlocked

Complete U.S. tax compliance

Capital recovery that offsets  
prior business losses

# BUSINESS OWNER MOVING FROM THE U.S. TO PUERTO RICO

*Disclaimer: All names of business owners and companies have been changed to protect client confidentiality. Actual performance and outcomes remain accurate, with identifying details anonymized for privacy.*

## Situation

Ethan, the owner of a thriving legal consulting firm, made a strategic move from Arizona to Puerto Rico a few years ago. With operations in both the U.S. and Puerto Rico, his business was generating over a million dollars in net income. However, dissatisfied with the CPA services he received on both sides of the border, Ethan turned to us for a comprehensive solution.

## Challenge

- Ethan’s previous CPA misplanned his tax strategy.
- Failed to leverage Puerto Rico’s tax incentives for export services.
- Led to \$300,000 in overpaid taxes in Year 1.
- Projected \$400,000 in additional overpayments for Year 2.

## Our process

We stepped in with a focused, dual-jurisdiction strategy:

- Comprehensive Tax Review: We analyzed Ethan’s tax returns from both the U.S. and Puerto Rico to uncover missed incentives.
- Tailored Tax Planning: Developed and implemented a strategy to maximize Puerto Rico’s tax incentives for export services, ensuring every eligible deduction and credit was captured.
- End-to-End Compliance: Managed all filings and compliance across both jurisdictions through our specialized Act 60 concierge service, streamlining the process and removing all logistical hurdles.
- Comprehensive Tax Review: Our firms in both the U.S. and Puerto Rico analyzed their tax returns to uncover missed incentives.

## Results

**\$700,000**  
in tax benefits

**10x**  
Return on  
Investment

Flawless  
Compliance

- 300K in tax refunds from the first year.
- +400k in next savings due to new tax strategy on the second year.
- Funds reinvested into his business.

A service investment of \$75K was transformed into massive savings.

All U.S. and Puerto Rico filings handled seamlessly.

## Impact

Ethan’s proactive decision to partner with us not only recaptured a substantial sum of money but also reinforced his business’s financial foundation. The recovered funds have empowered him to reinvest in new ventures and expand his operations in Puerto Rico. Now a returning client, Ethan’s experience underscores how leveraging specialized tax expertise can turn missed opportunities into significant growth and sustainability.

