



# CLIENT CASE STUDIES



Results Summary:

## DUAL JURISDICTION SAVINGS & COMPLIANCE - U.S. AND PUERTO RICO

Substantial U.S. tax savings  
achieved immediately

Long-term Puerto Rico tax  
reduction positioned for years  
of efficiency

## ACT 60 SET UP PAID FOR BY U.S. TAX SAVINGS

*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

Ryan Calloway is a strategic asset manager and owns a financial consulting business based in Georgia. He approached us with the goal of exploring Puerto Rico’s Act 60 Tax incentives.

With multiple income streams including W-2, K-1, real estate, and investment assets, Ryan was managing a complex financial picture.

## Challenge

While Act 60 promised long-term savings, Ryan also had untapped U.S. tax opportunities for immediate gains without relocating. Our team’s work was to:

- Identify U.S. tax savings for immediate impact without changing business location
- Set up his Act 60 structure for seamless Puerto Rico qualification
- Align short and long-term tax strategies for maximum benefit

## Our process

We handled Ryan’s case in two phases:

### Phase 1 – Puerto Rico Act 60 Setup

- Structured a compliant entity for his financial services business
- Completed legal and administrative steps for qualification
- Created a compliance plan for ongoing operations

### Phase 2 – U.S. Strategic Tax Plan

- Reviewed his full U.S. tax position
- Implemented immediate savings without relocation
- Synced short-term gains with long-term Act 60 benefits

## Impact

- Immediate tax savings in the U.S. offset his Act 60 setup costs.
- Long-term Puerto Rico structure positioned him for substantial tax reduction for years to come.
- Achieved results before relocation was finalized, giving him full confidence to proceed.
- Act 60 “paid for itself” through the combined strategies we implemented.

## Results

<b>Act 60 setup fully covered by tax savings</b>	<b>Immediate U.S. Tax Savings</b>
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- Achieved substantial U.S. tax savings right away, fully covering all Act 60 setup and administrative costs.
- Structured for long-term Act 60 tax reduction, maximizing financial efficiency for years to come.

