

# THE MSO STRATEGY

## A Management Services Organization

### WHAT IS IT?

A valuable tool to better protect your assets, save on taxes, and utilize those savings to hedge against risks.



MSOs have been around for decades. Typically seen in the healthcare industry, post Tax Cuts and Jobs Act of 2017 the structure is now advantageous for most business owners.

# 50%

The average amount in taxes business owners are overpaying due to suboptimal business structuring.



#### One Central Entity

Protect assets, share resources



#### Take your \$\$\$ Back

Retain the money you are unnecessarily losing to taxes.



#### Utilize the funds

M&As, succession funding, expansion, business reserves



#### Grow Wealth

Deploy funds towards wealth accumulation outside your business



#### Protect against 2026 tax increase

QBID deduction terminates, margin rates increase, estate tax increases



### HOW DOES IT WORK?

Adding an MSO to your enterprise means income received in the MSO's 21% tax environment creates a savings to any pass-through income taxed at 32-37%.

### EXAMPLE

Without an MSO

Tax Rate  
**37.9%**

Amount Owed  
**\$1,200,000**

VS

With an MSO

Tax Rate  
**21.8%**

Amount Owed  
**\$601,000**

Without an MSO, **\$599,000** is unnecessarily paid in taxes.



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## Guardian's Proven Process



SEE HOW AN MSO COULD  
OPTIMIZE YOUR  
STRUCTURE TODAY.



**SCAN OR CLICK** FOR A  
PERSONALIZED MSO  
PROJECTION.

