



CASE STUDY

“Partnering with Bennett Financials has been transformative for Optmyzr. Their strategic tax planning and optimization have **dramatically improved our financials all around.**”

Frederick Vallaey | CEO of [Optmyzr](#)

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Company Name
Optmyzr

Industry
Marketing & Advertising

THE CHALLENGE

Optmyzr is a leading digital marketing and advertising technology company that provides innovative tools and solutions to optimize online advertising campaigns. Founded by Frederick Vallaey, Optmyzr aims to empower marketers with powerful automation and optimization capabilities.

Before engaging Bennett Financials, Optmyzr faced several financial challenges:

- The previous accountant advised running more payroll, which led to increased tax liabilities.
- There was no formalized tax planning strategy in place.
- The entity structure was not optimized for tax savings, resulting in higher-than-necessary tax liabilities.

THE SOLUTION

Frederick Vallaeys sought the expertise of Bennett Financials to address these issues. Bennett Financials provided a comprehensive solution that included:

- Conducting an in-depth analysis of Optmyzr's financial situation.
- Implementing a structured tax planning strategy tailored to the company's specific needs.
- Optimizing the entity structure to maximize tax savings and efficiency.

IMPLEMENTATION

- Bennett Financials reviewed and revised the previous accountant's payroll recommendations.
- Developed and executed a formal tax planning strategy.
- Reorganized the entity structure to take full advantage of tax-saving opportunities.
- Provided ongoing advisory services to ensure continuous tax optimization.

The results of the collaboration between Optmyzr and Bennett Financials were outstanding:

- **Decreased tax liability by 124% for the year 2022.**
- **Successfully converted Optmyzr's tax liability into a tax refund, significantly improving the company's financial position. \$402,838 into \$80,000 refund**
- **Decreased tax liability for 2023 from \$425,388 to \$0.**

CONCLUSION

Optmyzr's experience with Bennett Financials highlights the importance of strategic tax planning and the impact of optimizing entity structures. By addressing these key areas, Optmyzr was able to significantly reduce its tax burden and improve its overall financial health, allowing the company to focus on its mission of empowering digital marketers.

Since Working With Bennett Financials, Optmyzr Has Achieved:



“Bennett Financials **strategic tax planning** and optimization have dramatically improved our financial all around, **resulting in substantial tax savings and even a tax refund.**”

– CEO Frederick Vallaeys