

Spot Bonus Case Study

Congratulations on your spot bonus! Sharing your success with our firm makes us all better. We appreciate your contributions that help make us a world class organization.

Your Name Austin Vanhove

Case Name Chloe Andenas DAF

What is the background on how the client was introduced to our firm?

COI

Who all was involved in the case from start to finish (Balefire team members and outside advisors if applicable)? What were their roles?

Brad Neugebauer, Tom Hannon

What problems did we help the client solve?

Tax Strategy with a DAF

Were there any challenges along the way? How did you overcome them?

Worked together great as a team

What was the total revenue generated from this case? 17,500