

TAX STRATEGY · 7 MIN READ

# You Have a Tax Preparer. You Think You Have a Tax Strategist.

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Every year, millions of business owners hand a stack of documents to someone they call their CPA and assume that person is doing two different jobs. They're not. Tax preparation and tax strategy are distinct disciplines — and confusing them is costing the average owner six figures over a decade.

This isn't a knock on CPAs. Most are excellent at what they do. The issue is what "what they do" actually means — and whether it includes what you think it includes.

## Two Different Jobs

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### Tax Preparer

- Files your return accurately
- Applies rules as written
- Works from documents you provide
- Looks backward — at what happened
- Reactive by design

### Tax Strategist

- Plans your tax position year-round
- Identifies incentives before filing
- Asks about your future plans
- Looks forward — at what's possible
- Proactive by design

## The Gap Between Them

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The U.S. federal tax code contains approximately 4 million words across more than 75,000 pages — and it grows every year. No single professional can be an expert in all of it. The code was designed with complexity in mind: hundreds of incentives exist, but they are opt-in. Nobody claims them on your behalf. If you don't know to ask, they don't get claimed.

### The Chevron Doctrine & IRS Interpretive Authority

For 40 years, a legal principle called Chevron deference gave federal agencies — including the IRS — broad authority to interpret ambiguous tax statutes. Courts were required to defer to agency interpretation even when that interpretation wasn't written in the law.

In June 2024, the Supreme Court overturned this doctrine in *Loper Bright Enterprises v. Raimondo* (Case No. 22-451). Courts now independently interpret ambiguous statutes rather than defaulting to agency positions.

Plain language: IRS guidance and positions that were previously treated as settled law are now more open to challenge. For business owners, this creates new opportunities — but only if you have someone actively watching for them.

**4M+**

words in the federal tax code

**75,000+**

pages of tax law

**\$7–10B**

in R&D; credits unclaimed annually

## What Changes When You Have Both

A tax preparer is essential. You need someone to file your returns accurately and keep you compliant. But your preparer is working from the documents you hand them — not from a proactive review of what you could have done differently.

A tax strategist works alongside your CPA as a specialist — focused on four areas where the tax code has the most leverage for business owners and real estate investors:

### Cost Segregation

Accelerate depreciation on real property. Reclassify components to 5, 7, or 15-year schedules and claim deductions now rather than over 27.5 or 39 years.

### R&D; Tax Credits

Qualified research activities — including process improvement, software dev, and product design — generate dollar-for-dollar tax credits most owners never claim.

## Section 179-D

Energy efficiency improvements to commercial buildings generate direct deductions up to \$5.65/sq ft. Most building owners have never heard of it.

## Bonus Depreciation

The One Big Beautiful Bill restored 100% bonus depreciation through 2029. Combined with cost seg, the first-year impact on a real property acquisition can be significant.

## How to Know Which One You Have

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Ask yourself these four questions about your current tax relationship:

- Does your advisor contact you proactively during the year — not just at tax time?
- Have they asked about your real estate holdings, R&D; activities, or energy-efficient improvements?
- Did anyone walk you through bonus depreciation or cost segregation in the last 12 months?
- Is there a written tax strategy document, not just a return?

If the answer to most of those is no, you have a tax preparer. That's not a failure on their part — preparation is what they were hired to do. The question is whether preparation is all you need.

### Find Out What You're Missing

We work alongside your existing CPA — not as a replacement. Schedule a conversation to see which of the four strategy areas applies to your situation.

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