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TAX PLANNING FAQs

What is Tax Planning?

What comes to mind when you hear the term tax planning? Does it mean saving your receipts and keeping track of your expenses and income? Or is much more than that? The answer is it is MUCH MUCH more than that. Tax planning is the practice of effectively using available strategies to either avoid or postpone taxes. It is the art of ensuring you keep as much of your hard earned money as possible.

Can You Put a Price on Good Tax Planning?

Tax planning is really invaluable. Because tax laws change every year and the new rules and regulations seem to become increasingly complicated with each turn of the calendar, the importance of tax planning has never been greater. At the same time, this also means that the benefits of tax planning are also more valuable than they've ever been before.



Why is Tax Planning Important for Business Owners?

When a person sets out to plan his or her business future there are many things to consider. One factor that owners often overlook, however, is that taxes are often the single greatest expense they will have in their lifetime. This is especially true as you make more and more money. In order to get the greatest return on your business investment, you have to be able to reduce your tax bill as much as possible.



How Much Can I Save?

By knowing and understanding important tax laws and regulations you can avoid some potentially huge mistakes that could cost you significant amounts of money. One of the best ways to prevent these kinds of mistakes is to seek professional tax planning help. In some cases, we have been able to eliminate a customer's tax bill completely. It all depends on what strategies you want to employ and how aggressive you want to be. We will show you the options and you can pick as many or as few of them to implement as you desire.

How Do You Ensure I Don't Miss Any Saving Opportunities?

Tax strategies can be numerous and complicated. We combine our vast knowledge and experience with a system called Tax Planner Pro. This revolutionary software sets the standard for tax planning and you get a subscription to it free with our service. The combination of these features is the basis of our Tax Planning Service.



What you receive with our Tax Planning Service

Subscription to Tax Planner Pro that integrates seamlessly with QuickBooks Online, QuickBooks Desktop, and Xero. You'll be able to access and use the software too.

Our accountants and CPAs will update your tax projections and options each month so that you have the most up-to-date information at your fingertips. Even better, we will email you when new information is available and what planning options you have. It's like having your own CFO for your business.

No more surprise tax bills! We will be working all year long to reduce your tax bill.

Throughout the year we will show you how to reduce your tax bill with strategies suited to your business and tax needs. We will analyze all aspects of your current financial position (including the business and personal data) and prepare a customized tax plan for you and your business.

Our team will walk you step by step through implementing and selecting the best strategies for your tax situation.

High level strategy session in the fall that allows us to find the exact right customization just for you before the end of the year.

No two tax situations are exactly the same so we will run different 'What If' scenarios in your meetings with us to see how variations of the different recommended strategies will impact your tax return to meet your personal goals.



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