

6 EASY STEPS

TO CREATE A MORE
TAX-FREE LIFE

This infographic outlines the processes we follow to create tax strategies designed to **rescue your income tax dollars**, how to properly document your expenses, reduce your audit risk, and **enhance your wealth** while reaching your financial goals.

1. ARE WE A GOOD FIT?

Schedule "Get Acquainted Phone Call". *What is your Number One Concern?* What industry are you in? What type of entity? How large? All of these questions impact what tax and accounting laws apply to you. Banking, home building, medical care are all very different.

2. WHAT SERVICES DO YOU WANT?

Entity formation. Tax planning and preparation. Payroll. Audit representation. CFO services. Profit and growth strategies. Implementation methodologies. The Four Methods of Communication. The Annual Tax Cycle.

3. BUILDING THE FOUNDATION

Is the entity correct? Keeping minutes. *Good record keeping.* Operating agreement in place. Bank resolution adopted. Corporation reimbursement policy is followed. Health and retirement plans established.

4. GROWING YOUR COMPANY FOR GROWTH

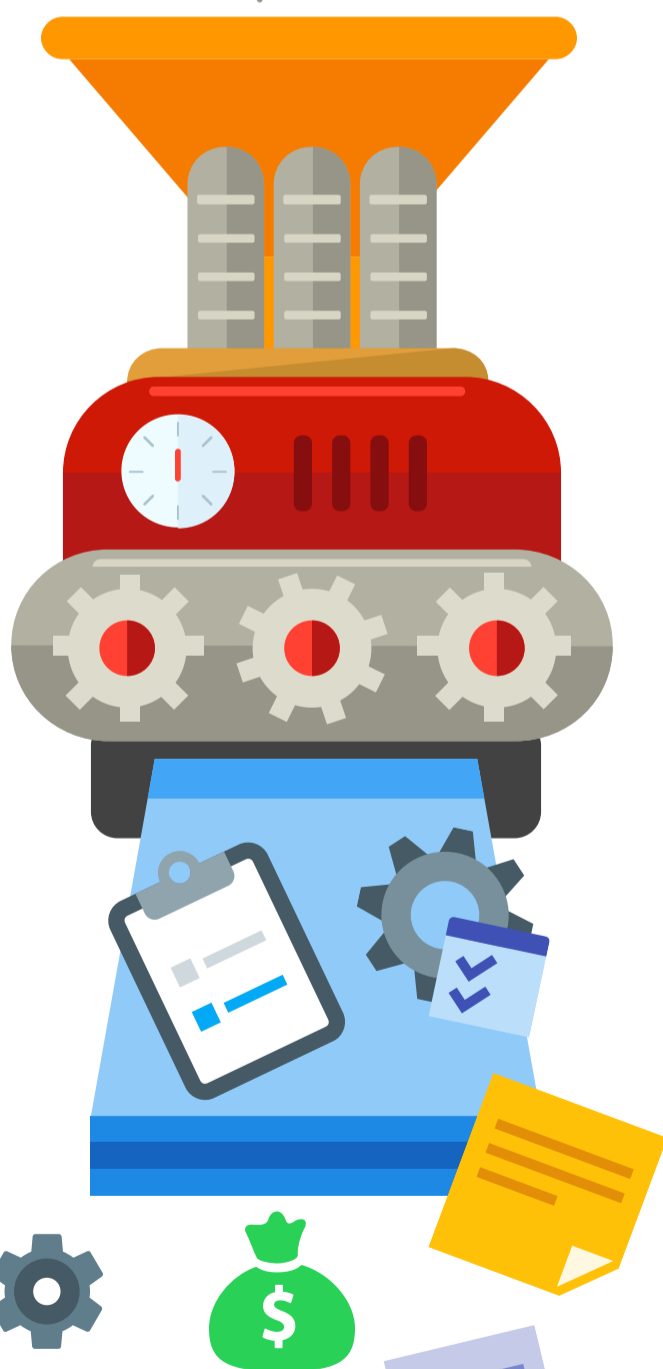
Tax and financial strategies are prioritized based upon efficacy, priority, and risks identified during *goal assessments*. Data is gathered for insight from personal and industry bases to leverage resources and time.

5. BEING PROACTIVE THROUGHOUT THE CYCLE

(In Jan.) businesses send income/ expenses. (In Feb.) business extensions. (In Mar./Apr.) tax filings. (In Jul.) Mid-Year Conferences. (In Nov.) Year-End Conferences. Clients share with us ahead of time *so we can plan for their best outcomes.*

6. CONSTANT AND CONTINUAL MONITORING

New tax laws are written, modified, and dropped. Tax court cases, private letter rulings change strategies. Industry standards change. *Your life changes.* So continual communication and monitoring is essential.



TO LEARN MORE



<https://bit.ly/GetAcquaintedCall>

<http://AtlantaTaxPlanner.com>

<https://bit.ly/WhyTaxPlan>

