



The 5 Spokes of Our Annual Tax Cycle

Our **Annual Tax Cycle** helps clients proactively plan their taxes and finances **creating the best possible outcome** for themselves based upon their future goals.

1



January

Businesses **send us their income and expenses**, not their receipts, just their numbers.

2



February

We file an **extension** for all businesses. Then they have only one tax deadline on April 15th.

3



March/April

We try to **file tax returns** by March 31. We need help, however, from our clients getting us their information.

4



July

We have a **mid-year tax planning** conference. Here we plan your strategies and taxes for the year and beyond.

5



November

We make **year-end tax planning** adjustments and plan for the following year. Long term objectives are emphasized.