Tax Planning Process

1. Collect 1040 & Pre-Qualify

- **Action:** Gather 1040 and supporting docs, pre-qualify client, upload into TaxPlanIQ.
- **Deliverable:** Uploaded 1040 in TaxPlanIQ with initial estimated savings noted.

2. Discovery & Finalization

- **Action:** Conduct questionnaire/meeting, finalize RAP strategies, pricing, package. Build presentation.
- **Deliverable:** Draft ROI proposal + presentation deck/outline prepared in TaxPlanIQ.

3. Conclusion Meeting (for the Sale)

- **Action:** Present ROI report, pricing, and package. Handle objections. Gain verbal agreement.
- **Deliverable:** Verbal client commitment to move forward.

4. Engagement Letter & Payment

- **Action:** Send engagement letter, collect ACH or card payment.
- **Deliverable:** Signed engagement letter + payment received.

5. Onboarding Meeting

- **Action:** 30–90 min kickoff. Clarify expectations, boundaries, communication cadence. Define tasks/to-dos.
- **Deliverable:** Onboarding checklist completed + client-specific implementation timeline.

6. Implementation

- **Action:** Assign internal firm tasks, client to-dos, and vendors within TaxPlanIQ.
- **Deliverable:** Live project plan with tasks/to-dos assigned.

7. Quarterly Check-In & Projection

- **Action:** Document material client changes (income/deductions/credits). Send revised projection.
- **Deliverable:** Updated tax projection report (if changes occur).

8. Annual Strategy Meeting

- **Action:** Review ROI actual vs projected. Discuss pricing/package. Upsell Phase II if relevant. Gather NPS-style feedback.
- **Deliverable:** Annual ROI report (actual vs projected) + updated package proposal.

9. Rinse & Repeat

- **Action:** Duplicate process for other clients or next phases of planning.
- **Deliverable:** New draft ROI proposals in pipeline.