Collaborative Tax Planning

What if you could **increase the value and fees** of the planning you provide?

Clients have a vague awareness of their tax situation and the specific opportunities available to impact their 1040, 1065 or 1120s. Here's how you can partner with your client's tax advisor to improve the client experience and gain new high-value referrals.

This course series will **grow** your list of options, **deepen** your knowledge, and **increase** the tools you have on hand for tax management:

- **Checklists for Tax Return Review and Tax Planning Opportunities**
- **Actual Case Studies**
- **Tax Strategies Lists for 1040, 1065 and 1120s**
- **Sample Action Plans**
- **Compliance Friendly Economic Models**
- **IRS Estimated Tax Calculator**

WiseBranch

Schedule a Consultation Today

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COLLABORATIVE TAX PLANNING CURRICULUM

SESSION 1
COLLABORATIVE TAX PLANNING ORIENTATION

SESSION 2
REVIEWING THE TAX RETURN FOR ACCURACY

SESSION 3
FINDING PLANNING OPPORTUNITIES

SESSION 4
IMPLEMENTING TAX PLANNING

SESSION 5
WORKING WITH THE TAX PREPARER

SESSION 6
QUARTERLY TAX PLANNING SESSIONS

SESSION 7
TAX PLANNING PAY DIVIDENDS

BONUS SESSION
SELECTED CASE STUDY

NOTE: This program is recommended to be used in collaboration with the client's tax preparer.