BLUEPRINT TAX ADVISORS

Tax Blueprint Preview

What a purchased tax planning blueprint can include

This sample is intentionally generic and does not include actual client information. A purchased Tax Blueprint is built from your actual return, income, entity structure, goals, and documents.

Purpose of this preview

To show the type of analysis, modeling, questions, and implementation plan our clients receive when they hire us for proactive tax planning.

Sample Only | For Educational and Discussion Purposes | CPA Review Required Before Implementation

1. What a Tax Blueprint Is

A Tax Blueprint is a personalized planning report designed to turn your tax return into a strategy. We review what happened, identify planning opportunities, model the potential impact, and organize the action items in a way that can actually be implemented.

What clients receive

- A plain-English review of your current tax picture
- A prioritized list of planning opportunities
- Modeled projections using your actual facts and assumptions
- A deadline-driven implementation roadmap
- CPA-level notes on what must be confirmed before changes are made

What this is not

- Not a generic tax tip checklist
- Not a guarantee of specific savings
- Not a substitute for a signed engagement
- Not legal, investment, or payroll advice without the proper professionals involved

Blueprint Review Areas

AREA	WHAT WE REVIEW
Tax return review	We look for missed deductions, unusual tax drivers, payment issues, and items that may need correction or follow-up.
Business structure	We evaluate whether your current structure still fits your income, compliance needs, payroll reality, and long-term goals.
Retirement planning	We compare the tax effect of retirement plan options and help coordinate the timing with your income and cash flow.
State tax planning	We review state-level elections, pass-through tax opportunities, estimated payments, and multi-state exposure when applicable.
Estimated taxes and cash flow	We build a practical payment plan so taxes are not a surprise when filing season arrives.
Implementation roadmap	We turn the strategy into due dates, responsible parties, and next steps so the plan does not sit on a shelf.

2. Sample Executive Summary

The executive summary gives the client a quick view of the highest-value opportunities, what requires action, and what needs additional confirmation. The actual items are based on the client facts, not a standard checklist.

AREA	ACTION	PRIORITY	WHAT THE BLUEPRINT SHOWS
Entity Structure Review	Model	**High**	Potential payroll tax, compliance, and cash-flow impact
Retirement Plan Design	Compare	**High**	Potential deduction increase and long-term savings plan
State Tax Election Review	Evaluate	**High**	Potential federal deduction and state tax coordination
Health Insurance Deduction Review	Confirm	**Medium**	Possible above-the-line deduction or payroll treatment update
Estimated Tax Payment Plan	Update	**Urgent**	Reduce surprise balances and underpayment penalties
Return Review Items	Discuss	**Medium**	Items that may require clarification, correction, or documentation
Investment and IRA Strategy	Coordinate	**Medium**	Tax treatment review and advisor coordination when needed

Sample Notes We May Include

- The largest tax driver may not be the obvious one. We isolate the item creating the most federal, state, or payroll tax pressure.
- The plan may require coordination between the business, payroll provider, retirement plan provider, and investment advisor.
- Timing matters. Some strategies must be in place before year-end, while others can be corrected or adjusted at filing.
- Not every opportunity is worth implementing. We weigh tax savings against compliance cost, administrative burden, and risk.

3. Analysis of Prior Periods

This section explains what your prior return is telling us. The goal is not to re-prepare the return in the report. The goal is to identify planning signals, tax drivers, and items that need a CPA discussion before implementation.

REVIEW POINT	QUESTIONS OUR BLUEPRINT ANSWERS
Income mix	How much income is wages, business profit, pass-through income, investment income, retirement income, or other income?
Tax drivers	Which taxes are creating the largest bill: regular income tax, self-employment tax, payroll tax, state tax, NIIT, AMT, or penalties?
Deduction patterns	Are deductions being used in the best place, and are there deductions that need documentation or reclassification?
Payment history	Did estimates, withholding, credits, or safe-harbor rules protect the client? Will that still work next year?
Business and payroll signals	Does the current setup match the client income level, salary needs, compliance load, and growth plan?

Return Review Items

When we see items that require confirmation, we flag them clearly. We do not tell a client to change something without confirming facts, documentation, timing, and professional responsibility.

ITEM TYPE	HOW IT APPEARS IN THE BLUEPRINT
Documentation needed	We may ask for support for major deductions, asset purchases, charitable gifts, health insurance premiums, basis records, or business expenses.
Possible missed deduction	We identify deductions or credits that appear missing based on the documents available.
Potential treatment issue	We flag items that may need to be moved, reclassified, or discussed before an amended return or future filing approach is considered.
Payment adjustment	We recommend updated estimates or withholding when the current payment pattern is likely to create a balance due.

4. Recommendations

Recommendations are written to be useful, but not do-it-yourself. The Blueprint explains the opportunity, why it matters, what must be confirmed, and what our team can help coordinate after the client authorizes the engagement.

#	RECOMMENDATION AREA	WHAT WE DO FOR THE CLIENT
1	**Business Structure Review**	We compare the client current structure against possible alternatives and model the tax impact, compliance cost, payroll requirements, and timing.
2	**Retirement Plan Strategy**	We analyze whether the current retirement setup is still the best fit and show how different plan designs may affect taxable income and owner savings.
3	**State Tax Planning**	We review available state-level elections and payment methods, including whether entity-level payments may improve the federal deduction outcome.
4	**Health Insurance and Fringe Benefit Treatment**	We review whether premiums or benefits are being handled correctly and whether the tax return, payroll, or entity needs to be updated.
5	**Estimated Tax and Withholding Plan**	We calculate a practical payment approach based on projected income, prior-year safe harbor rules, payroll withholding, and filing goals.
6	**Advisor Coordination**	When needed, we coordinate tax items with payroll providers, attorneys, financial advisors, retirement plan providers, and bookkeepers.

Why This Matters

The value is in the modeling, sequencing, and implementation. A strategy may look simple on paper, but the details often involve deadlines, payroll setup, entity documents, IRS elections, state elections, plan documents, basis records, and advisor coordination. The Blueprint puts those pieces in order.

5. Projected Impact and Next Steps

When the facts support it, we include a scenario comparison so the client can see how the planning items may affect income, deductions, federal tax, state tax, payments, and projected balance due or refund. The figures in a purchased Blueprint are based on the client actual documents and assumptions.

MODELING AREA	WHAT THE CLIENT SEES
Income and structure	Current setup compared with proposed planning scenario
Deductions	Current deductions compared with available planning opportunities
Federal tax	Regular income tax, self-employment tax, payroll tax, credits, and other federal taxes
State tax	Personal state tax, entity-level tax options, and credit coordination
Payments	Withholding, estimated tax payments, safe harbor targets, and cash-flow timing
Projected result	Estimated balance due, refund, or tax savings range based on the stated assumptions

Typical Next Steps After a Blueprint

1. Review the Blueprint with our team - We walk through the findings, priorities, risks, assumptions, and deadlines.

2. Confirm missing facts - We request only the items needed to finalize the recommendation or quantify the benefit.

3. Authorize implementation - If the client wants us to move forward, we send the appropriate engagement agreement.

4. Coordinate the moving pieces - We help coordinate the tax, payroll, entity, bookkeeping, and advisor steps needed to put the plan in motion.

5. Update the tax plan during the year - As income changes, we update estimates, deadlines, and planning items so the plan stays useful.

Important Notes

This preview is a sample marketing document. It contains no client information and should not be used to implement a tax strategy. A purchased Tax Blueprint is prepared after document review, client-specific analysis, and CPA review. Tax savings are not guaranteed. Implementation may require a separate engagement and coordination with legal, payroll, investment, or retirement plan professionals.