YOUR  
LOGO

**COMPANY NAME**

TAX PREPARATION PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Firm Name] for your tax preparation needs. We specialize in accurate, timely, and compliant tax filing services for individuals and businesses, ensuring peace of mind during tax season.  
  
This proposal outlines our approach and services to support [Client Name] with year-end tax preparation.

# Problem or Opportunity

[Client Name] requires reliable support to prepare, file, and review taxes to avoid penalties, ensure deductions are maximized, and meet all filing deadlines.

# Proposed Solution

We propose comprehensive tax preparation services tailored to your financial profile and entity type.  
  
Key Benefits:  
- Accurate tax filing that minimizes liabilities  
- Compliance with federal and state tax regulations  
- Timely submissions and ongoing support

# Scope of Work

Our tax preparation services include:  
  
- Document collection and review  
- Income and expense reconciliation  
- Deduction and credit optimization  
- Federal and state tax return filing  
- E-filing confirmation and record keeping  
- Year-round support for tax-related questions

# Timeline

Estimated schedule for tax preparation and filing:

|  |  |  |
| --- | --- | --- |
| Milestone | Description | Estimated Date |
| Document Submission | Client provides tax documents | [Start Date] |
| Preparation Phase | Review, reconciliation, and draft return | [Date] |
| Filing | Submit federal and state tax returns | [Date] |
| Confirmation | Provide e-filing receipt and summary | [Completion Date] |

# Pricing

Estimated pricing for tax preparation services:

|  |  |  |
| --- | --- | --- |
| Service | Description | Cost |
| Individual Tax Return | Form 1040 with standard schedules | [Amount] |
| Business Return | Schedule C or corporate return | [Amount] |
| State Filing | One or more state returns | [Amount] |
| Total |  | [Total] |

# About Our Firm

[Your Firm Name] has extensive experience helping individuals, sole proprietors, and businesses meet tax obligations efficiently and accurately.  
  
- Experience: [X] years in tax preparation and planning  
- Certifications: [CPA, EA, or others]  
- Mission: To simplify tax season while maximizing compliance and savings

# Case Studies / Testimonials

Case Study: [Client Business Name]  
  
- Project: Business tax filing and advisory  
- Outcome: Reduced audit risk and identified additional savings through credits  
  
Testimonial:  
“[Your Firm Name] handled everything with professionalism and clarity. We now approach tax season stress-free.” — [Client Name], [Title]

# Terms and Conditions

Payment Terms: 50% deposit, 50% due upon filing.  
Privacy: All financial information will be kept strictly confidential.  
Revisions: Includes one round of post-filing adjustments, if needed.

# Acceptance

To begin tax preparation services, please sign below.  
  
Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Name: [Client’s Printed Name]  
Title: [Client’s Title]  
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_