



Tax Planning

This is our chance to explore a 2024 Tax Return Projection while there are still several months in the year to make adjustments. For many this will estimate your potential tax liability when the return is filed. Others will take planning a step further. We will analyze things like major business purchases, retirement contributions, and officer's compensation. In a year with many changes tax planning provides knowledge & peace of mind.

The first step in tax planning is to upload the documents needed to perform the tax projection. Below is a list of typical documents that we need for your projection. Please be sure to provide information related to ALL sources of taxable income even when not specified below:

- Most recently filed tax return if not filed by RANGEVIEW.
- Most recent check stub(s), and job start date if not full year.
- Statement of retirement distribution(s) as applicable. Or detailed notes of expected distribution(s) & withholding amount(s) for 2024.
- Notes detailing interest, dividends, and stock sales. Brokerage statement if applicable. If there are no major changes from your prior year tax return just say "same as last year" in a Word Doc. (referenced below)
- Rental Income- please provide expected net income (after expenses).
- Sale of Home: Closing Statement at Purchase & Sale. Itemized list of improvements and their costs.
- IRA or HSA Contributions Planned
- Have you made any estimated tax payments this year?
- Client Notes and/or Summary Sheet: Please provide any crucial notes or summaries in a Word Doc.
- Business:** Upload YTD Profit & Loss or best estimate of net income at year end. Also, upload your YTD Payroll Summary Report if RANGEVIEW doesn't do your payroll.

[CLICK HERE for a direct link to the Secure Client Portal login page.](#)

Once you have upload **ALL** of the information necessary for your projection please send me an email with "**Ready for Projection**" in the subject line so I'll know the documents are ready for data entry.

After the Tax Projection has been developed you will receive a link to schedule our review of the projection, and go over your areas of opportunity.

Note: Hourly rate for tax planning is \$175.