



Deliver Tax Plan

Following the review and discussion of the tax plan with the client, we ensure the delivery of the Tax Plan via email and also upload a copy into the client portal for easy access. This process provides clients with convenient access to their updated tax plan and can refer to it whenever needed.

The next step in the process involves the implementation of the tax plan, which includes meeting with the client to execute the recommended tax strategies outlined in the Tax Plan. This ensures that clients are actively engaged in the process and enables them to make informed decisions regarding their tax strategies.