



Jefferson-Franklin Tax Services

YOUR TAXES: Planned. Prepared. Solved!

Main: 623.240.9545 | Toll-Free Fax: 866.779.5210 | Email: info@jeffersonfranklintax.com

Tax Planning

Your Name: _____
 Business Name: _____
 Business Address: _____
 Your City, State, ZIP: _____
 Your Email: _____
 Phone/Fax: _____

Prev. Year Revenue:	Gross: _____	Net: _____
Current Year (est.):	Gross: _____	Net: _____
Employees:	FT: _____	PT: _____

1 2 3 4 5 Please rank these business challenges from 1 (low) to 5 (high):

- Finding/closing new customers/clients
- Retaining customers/clients
- Growing revenue from existing customers/clients
- Controlling expenses
- Managing time
- Managing employees

- Y: N: I offer health benefits for employees
 Y: N: I offer retirement benefits for employees
 Y: N: I manage an investment portfolio
 Y: N: I manage business or investment real estate

What's your "exit strategy" for the business? (walk away, sell, leave to family, etc.)

What is your biggest business or financial frustration?

How did you originally hear about us?

Briefly describe what you're looking for from us:

