



Carlotta
THOMPSON & Associates

Tax Strategy AUDIT

The Tax Strategy Audit Includes:



Review the last 3 years of tax returns for the business and for persona



Review the general ledger for the previous year to identify Audit Red Flags and Unused Tax Strategies you can benefit from



Create a custom tax strategy plan that details all of the ways you can reduce your tax bill



1 on 1 personal call with Carlotta to understand the nuances of your business



Two additional consulting calls with Carlotta or team to help understand how best to implement the tax strategies into your business

If you're over the multiple million mark, chances are you have an in-house accounting service or bookkeeper and aren't in need of our full done for you program, but could benefit from a custom tax strategy. At this level you'll work 1-1 with Carlotta to review your general ledger and create a tax strategy for your business. We then help you to implement the tax strategy and you can keep using your internal accounting department. On average, we save customers joining this program 5 to 6 figures per year, just through tax savings.

This is Carlotta's super power - finding tax strategies to use and getting inside of a company by reviewing the general ledger. By simply looking at the numbers, Carlotta uses her IRS background and years of experience to quickly find all of the issues in your company (Audit Red Flags) and places you can save on taxes.

To learn how we can help you save on taxes and support your internal team, select a time to chat with our Tax Strategy Audit consultant.

To learn how this program can help your small business, book a call with one of our tax strategists. carlottathompson.com