


BUSINESS PLAN 2023





Tax Preparation Business Plan


Maximize Returns, Minimize Stress

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Information provided in this business plan is unique to this business and confidential; therefore, anyone reading this plan agrees not to disclose any of the information in this business plan without prior written permission of the company.

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Business planning that's simpler and faster than you think

Creating a business plan using Upmetrics to start and grow a business is literally the easiest thing in the World. Simply read the instructions and fill in the blanks. It's as simple as that.

Upmetrics has everything you need to create a comprehensive business plan.



AI-powered Upmetrics Assistant

AI-powered insights to streamline your plan

Not sure where to start? Upmetrics' AI Assistant will automatically generate ideas for each section of your plan and offer improved versions of your writing, adjusting for tone, voice, and grammar or spelling errors.

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Join over 110K entrepreneurs who trust **Upmetrics with Business Planning**

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1.

Executive Summary



REMEMBER

An executive summary is the first section of the business plan intended to provide an overview of the whole business plan.

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Help tip

Tax Preparation Business Plan

Start your executive summary by briefly introducing your business to your readers.

This section may include the name of your tax preparation business, its location, when it was

To unlock help try Upmetrics!

Start writing here..

Market opportunity

Help tip

Tax Preparation Business Plan

Summarize your market research, including market size, growth potential, and marketing trends. Highlight the opportunities in the market and how your business will fit in to fill the gap.

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Start writing here..

Services Offered

Help tip

Tax Preparation Business Plan


Highlight the tax preparation services you offer your clients. The USPs and differentiators you offer are always a plus.

To unlock help try Upmetrics!

Start writing here..

Marketing & sales strategies

 **Help tip**

 **Tax Preparation Business Plan**


Outline your sales and marketing strategies—what marketing platforms you use, how you plan on acquiring customers, etc.

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Start writing here..

Financial Highlights

 **Help tip**

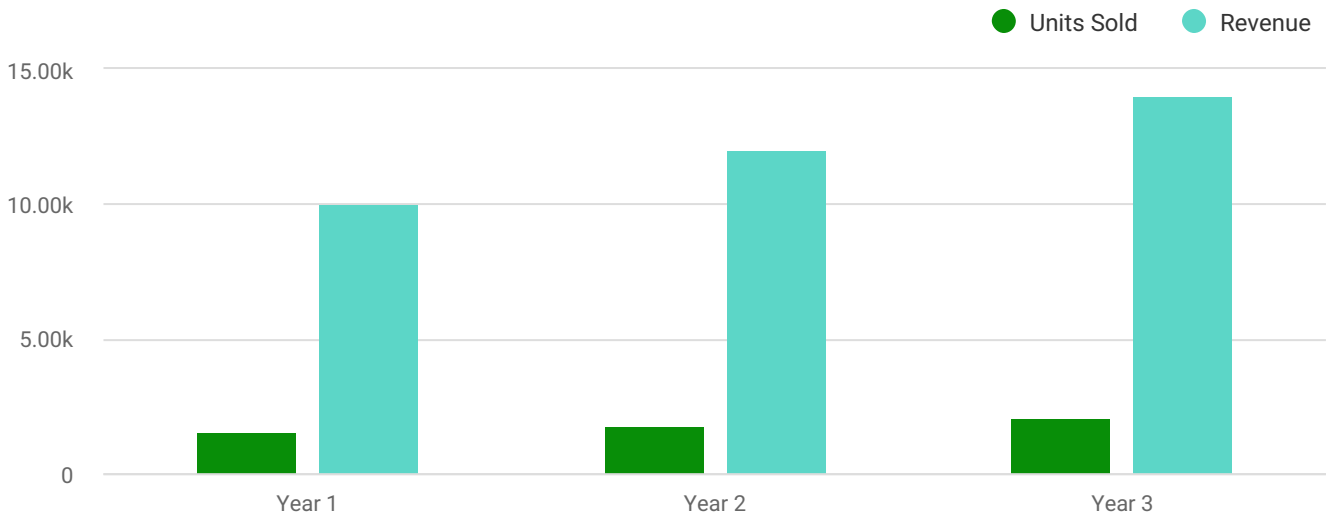
 **Tax Preparation Business Plan**

Briefly summarize your financial projections for the initial years of business operations. Include any capital or investment requirements, associated startup costs, projected revenues, and profit forecasts.

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Start writing here..

Units Sold v/s Revenue



Financial Year	Units Sold	Revenue
Year 1	1,550	\$10,000
Year 2	1,800	\$12,000
Year 3	2,050	\$14,000

 Help tip

 Tax Preparation Business Plan

Summarize your executive summary section with a clear CTA, for example, inviting angel investors to discuss the potential business investment.

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Write a call to action for your business plan.

2.

Company Overview



REMEMBER

Depending on what details of your business are essential, you'll need different elements in your business overview.

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Help tip

Tax Preparation Business Plan

Describe your business in this section by providing all the basic information:

Describe what kind of tax preparation company you run and the name of it. Here are some of

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Start writing here..

Ownership

Help tip

Tax Preparation Business Plan


List the founders or owners of your tax preparation business. Describe what shares they own and their responsibilities for efficiently managing the business.

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Mission statement

 Help tip

 Tax Preparation Business Plan

Summarize your business' objective, core principles, and values in your mission statement. This statement needs to be memorable, clear, and brief.

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Our mission at [Elite Tax Solutions] is to provide accurate, reliable, and timely tax preparation services to our clients, helping them navigate the complexities of the tax code with ease.

We are committed to upholding the highest standards of integrity, transparency, and customer satisfaction, ensuring that our clients can trust us with their most sensitive financial information.



Business history

 Help tip

 Tax Preparation Business Plan


If you're an established tax preparation service provider, briefly describe your business history, like—when it was founded, how it evolved over time, etc.

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Start writing here..

Future goals

 Help tip

 Tax Preparation Business Plan

It's crucial to convey your aspirations and vision. Mention your short-term and long-term goals; they can be specific targets for revenue, market share, or expanding your services.

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Start writing here..

3.

Market Analysis



REMEMBER

Market analysis provides a clear understanding of the market in which your printing business will run along with the target market, competitors, and growth opportunities.

To unlock help try Upmetrics!

Help tip

Tax Preparation Business Plan

To write the introduction section of your market analysis, start by clearly identifying your primary target market.

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Start writing here..

Target Market

Help tip

Tax Preparation Business Plan

Start this section by describing your target market. Define your ideal customer and explain what types of services they prefer. Creating a buyer persona will help you easily define your target market to your readers.

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Start writing here..

Market size and growth potential

Help tip

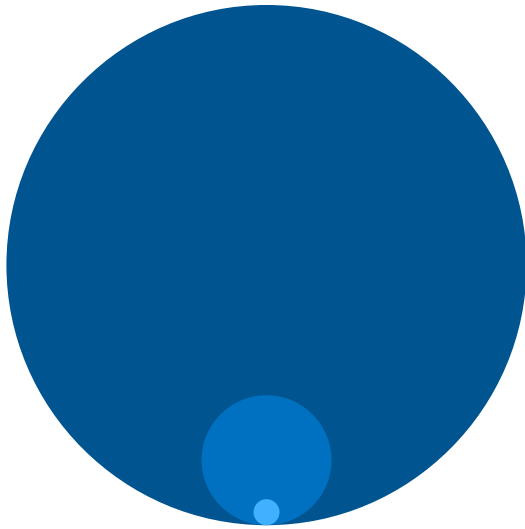
Tax Preparation Business Plan

Describe your market size and growth potential and whether you will target a niche or a much broader market.

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Start writing here..

Market Size



Available Market

Total individuals and businesses needing tax preparation services

20M

Served Market

Individuals and businesses our services can reach.


5M

Target Market


Our ideal customers in the served market.

1M

 **Help tip**

 **Tax Preparation Business Plan**

Identify and analyze your direct and indirect competitors. Identify their strengths and weaknesses, and describe what differentiates your tax preparation services from them.

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Competitive analysis

TaxPros Inc.

TaxPros Inc. is a well-established independent tax preparation service provider with a strong presence in the [Location] area.

Features

Offers a wide range of tax preparation services

Individual and business tax filings

IRS audit representation and tax planning.

Strengths

Extensive experience and a large customer base

Strong local reputation for accuracy and reliability.

Skilled and certified tax professionals.

Weaknesses

Limited online presence and digital capabilities.

Less flexible operating hours compared to some competitors.

Pricing is slightly higher than the industry average.

eTax Solutions

eTax Solutions is an online tax preparation platform that caters to a broad national audience, providing convenient, cloud-based tax services.

Features

- Offers a user-friendly interface
- E-filing options
- Tax refund tracking
- Mobile app for on-the-go tax preparation.

Strengths

- Accessibility and convenience with 24/7 availability.
- Competitive pricing and various pricing packages.
- Strong emphasis on data security and privacy.

Weaknesses

- Lack of in-person support, which may deter some clients.
- Limited ability to handle complex tax scenarios effectively.
- Heavily reliant on technology, which may pose a challenge for less tech-savvy customers.

Brown & Associates CPA

Brown & Associates CPA is a local Certified Public Accountant (CPA) firm specializing in tax preparation, accounting, and financial consulting services.

Features

- Offer comprehensive tax planning
- IRS issue resolution
- Bookkeeping, and financial advisory services

Strengths


- Expertise in complex tax scenarios and high-net-worth individuals.
- Personalized, one-on-one consultations with clients.
- Strong network of local business clients.

Weaknesses


- Higher pricing due to the specialized services offered.
- Limited online presence and marketing efforts.
- Potential capacity constraints during peak tax seasons.

Market trends

 **Help tip**

 **Tax Preparation Business Plan**

Analyse emerging trends in the industry, such as technology disruptions, changes in customer behavior or preferences, etc. Explain how your business will cope with all the trends.

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Start writing here..

Regulatory environment

Help tip

Tax Preparation Business Plan

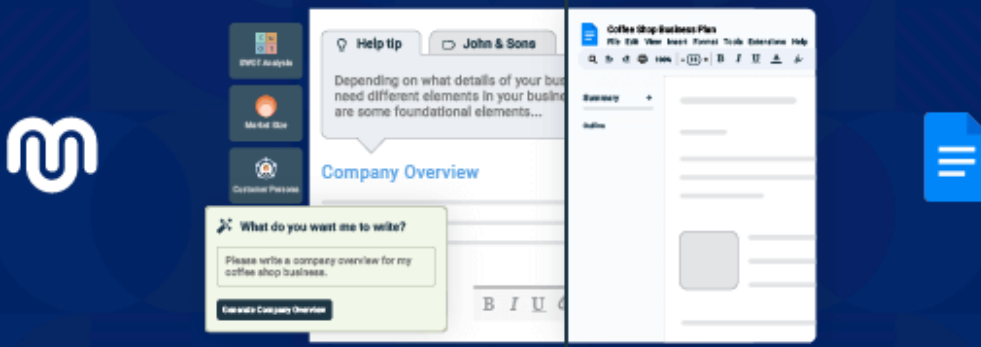
List regulations and licensing requirements that may affect your tax preparation company, such as business registration, Preparer Tax Identification Number (PTIN), state-specific requirements, tax preparer bond, insurance requirements, etc.

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Start writing here..

Upmetrics vs Business Plan Templates

You have a unique business with a distinct vision, and your business plan must reflect that. Although it won't be possible with generic templates.



Upmetrics guided builder prompts you with tailored questions and helps answer them to create your business plan. You also have access to AI Assistant and other resources to seek guidance and ensure you're on the right track.

[Start your planning today](#)

4.

Products and Services



REMEMBER

The product and services section of a tax preparation business plan should describe the specific services and products that will be offered to customers. To write this section should include the following:

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Help tip

Tax Preparation Business Plan

To craft the introduction for your "Products and Services" chapter, begin by positioning your business within its industry, emphasizing its unique strengths or value proposition.

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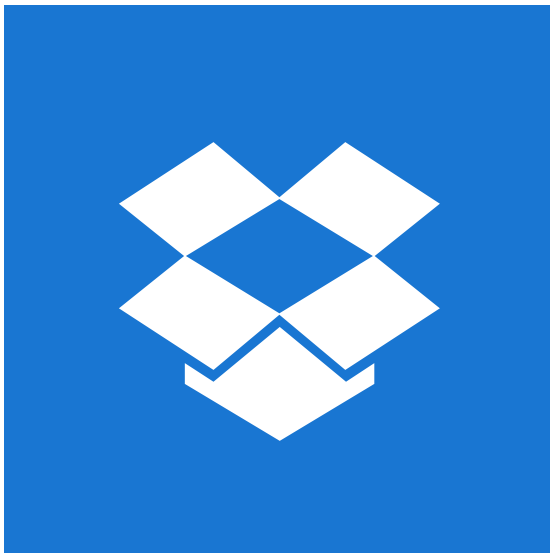
Start writing here..

Help tip

Describe the tax preparation services your business will offer. This list may include services like,

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Services



Federal Tax Return Preparation

Price: **[\$250]**

Preparation and filing of federal tax returns for individuals or businesses.

Specifications

- Turnaround time: 7-10 days
- Includes state tax return preparation
- E-filing option available



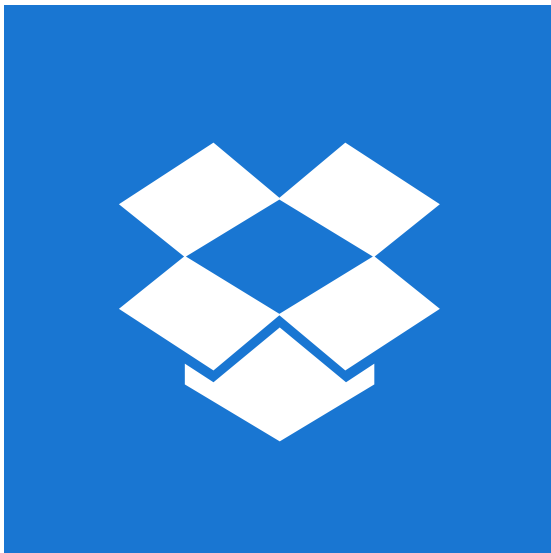
State and Local Tax Return Preparation

Price: **[\$150]**

Preparation and filing of state and local tax returns for individuals or businesses.

Specifications

- Turnaround time: 5-7 days
- Consultation for possible state tax credits and deductions
- E-filing option available



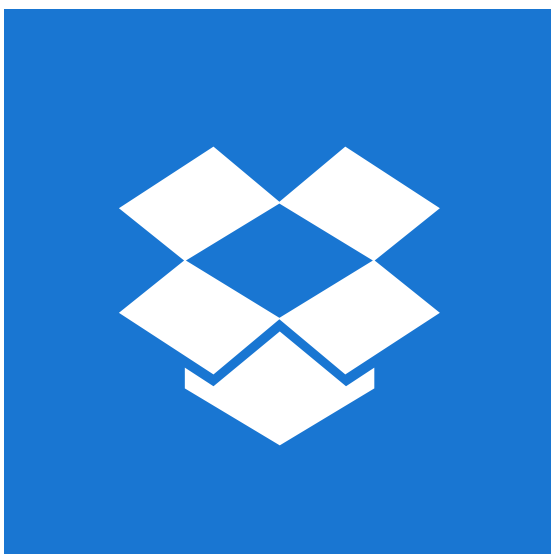
Tax Planning and Consulting

Price: **[\$300] per hour**

Professional tax planning and consulting to help minimize tax liabilities and maximize credits and deductions.

Specifications

- In-depth analysis of financial situation
- Proactive tax strategy development
- Ongoing support throughout the year



IRS Audit Support

Price: **[\$500]**

Expert guidance and representation in case of an IRS audit.

Specifications

- Review of all tax documents
- Preparation for audit meetings
- Representation during audit meetings



Tax Resolution Services

Price: **Starting at [\$1,000]**


Assistance with resolving tax issues, such as back taxes, penalties, and audits.

Specifications

- In-depth investigation of the tax problem
- Negotiation with IRS or state tax agencies
- Development and implementation of resolution strategy

Quality Measures

 **Help tip**

 **Tax Preparation Business Plan**


Provide a detailed description of each service you provide, including the process involved, the time required, etc.

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Start writing here..

Additional Services

 **Help tip**

 **Tax Preparation Business Plan**

This section should explain how you maintain quality standards and consistently provide accurate, reliable, and timely services.

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Start writing here..

5.

Sales And Marketing Strategies



REMEMBER

Writing the sales and marketing strategies section means a list of strategies you will use to attract and retain your clients.

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Help Tip

Tax Preparation Business Plan

To create an effective introduction for your "Sales and Marketing Strategies" chapter, start by setting the stage within your specific industry or market.

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Start writing here..

Unique Selling Proposition (USP)

Help tip

Tax Preparation Business Plan

Define your business's USPs depending on the market you serve, your expertise in the market, and the unique services you provide. Identifying USPs will help you plan your marketing strategies.

To unlock help try Upmetrics!

Start writing here..

Pricing Strategy

Help tip

Tax Preparation Business Plan

Describe your pricing strategy—how you plan to price your tax preparation services and stay competitive in the local market.

To unlock help try Upmetrics!

Start writing here..

Discuss your marketing strategies to market your services. You may include some of these marketing strategies in your business plan—social media marketing, networking, Google ads, brochures, email marketing, content marketing, and print marketing.

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Marketing strategies

Online



Social Media

Utilizing platforms such as [Facebook, Twitter, Instagram] to reach potential clients and engage with our community.



Email Marketing

Sending out regular newsletters and promotional offers to our email list.



Content Marketing

Publishing tax-related articles and resources on our website to attract organic traffic.



Google Ads

Running targeted Google Ads to reach individuals searching for tax preparation services in our area.

Offline



Brochures

Distributing brochures at local businesses and community centers.



Networking

Building relationships with local businesses and participating in community events.

Outline the strategies you'll implement to maximize your sales. Your sales strategies may include direct sales calls, partnering with local notary businesses, offering referral discounts, etc.

To unlock help try Upmetrics! 

Sales strategies



Partner with Businesses

Partnering with local notary businesses to cross-promote our services.



Referral Programs

Offering discounts to clients who refer new customers to our business.

Describe your customer retention strategies and how you plan to execute them. Your customer retention strategies may include introducing loyalty programs, proactive communication, personalized customer services, and offering referral discounts.

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Customer retention



Loyalty Programs

Offering rewards to repeat clients.



Referral Discounts

Offering discounts to existing clients who refer new customers to our business.



Personalized Service

Providing tailored services to meet the specific needs of each client.

6.

Operations Plan



REMEMBER

When writing the operations plan section, it's important to consider the various aspects of your business operations.

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Help tip

Tax Preparation Business Plan

To create an effective introduction for your "Operational Plan" chapter, start by emphasizing the pivotal role of efficient operations in the success of your business, underscoring how they directly impact the quality of services delivered.

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Start writing here..

Staffing & Training

Help tip

Tax Preparation Business Plan

Mention your business's staffing requirements, including the number of bookkeepers, tax preparers, and other employees needed. Include their qualifications, the training required, and the duties they will perform.

To unlock help try Upmetrics!

Start writing here..

Operational Process

Help tip

Tax Preparation Business Plan

Outline the processes and procedures you will use to run your tax preparation business. Your operational processes may include client communication, tax preparation, financial management, staff management, and regulatory compliance.

To unlock help try Upmetrics!

Start writing here..

Software & Technology

 **Help tip**

 **Tax Preparation Business Plan**

Include the list of software and technology required for tax preparation, such as tax preparation software, client management software, financial management software, document management software, and regulatory compliance software.

To unlock help try Upmetrics! 

Start writing here..

7.

Management Team



REMEMBER

The management team section provides an overview of the individuals responsible for running your business plan.

To unlock help try Upmetrics!

Help tip

Tax Preparation Business Plan

To craft an introduction for your "Management Team" chapter, begin by emphasizing the crucial role of leadership in the success of any business.

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Start writing here..

Key managers

Help tip

Tax Preparation Business Plan

Introduce your management and key members of your team, and explain their roles and responsibilities.

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Start writing here..



JOHN DOE

CEO - john.doe@example.com

John brings over 20 years of experience in tax preparation and financial management. His vision for [Elite Tax Solutions] is to provide exceptional tax services that meet the unique needs of each client.



Education and Professional Background:

- John holds a Bachelor's Degree in Business Administration from the University of California.
- He is a Certified Public Accountant (CPA) and has worked with some of the top tax firms in the country before founding [Elite Tax Solutions].



JANE DOE

Tax Manager - jane.doe@example.com

Jane is a detail-oriented tax professional with over 15 years of experience in tax preparation and planning. She leads the tax team in providing accurate and efficient tax services to our clients.



Education and Professional Background:

- Jane has a Master's Degree in Accounting from the University of Southern California and is a licensed Enrolled Agent (EA).
- She has worked with various tax firms and has a wealth of experience in dealing with complex tax situations.



SARAH SMITH

Customer Service Manager - sarah.smith@example.com

Sarah is dedicated to ensuring that our clients receive the best possible service. She manages the customer service team and oversees all client interactions.

Education and Professional Background:

- Sarah has a Bachelor's Degree in Communication from the University of Texas.
- She has over 10 years of experience in customer service and has completed various training programs in customer relationship management.



ROBERT BROWN

Accounting Manager - robert.brown@example.com

Robert is responsible for managing the accounting and financial records of our business. His meticulous approach ensures accuracy and compliance with accounting standards.




Education and Professional Background:

- Robert holds a Bachelor's Degree in Accounting from the University of New York and is a Certified Management Accountant (CMA).
- He has worked in various accounting roles, gaining valuable experience in financial management.

Organizational structure

 **Help tip**

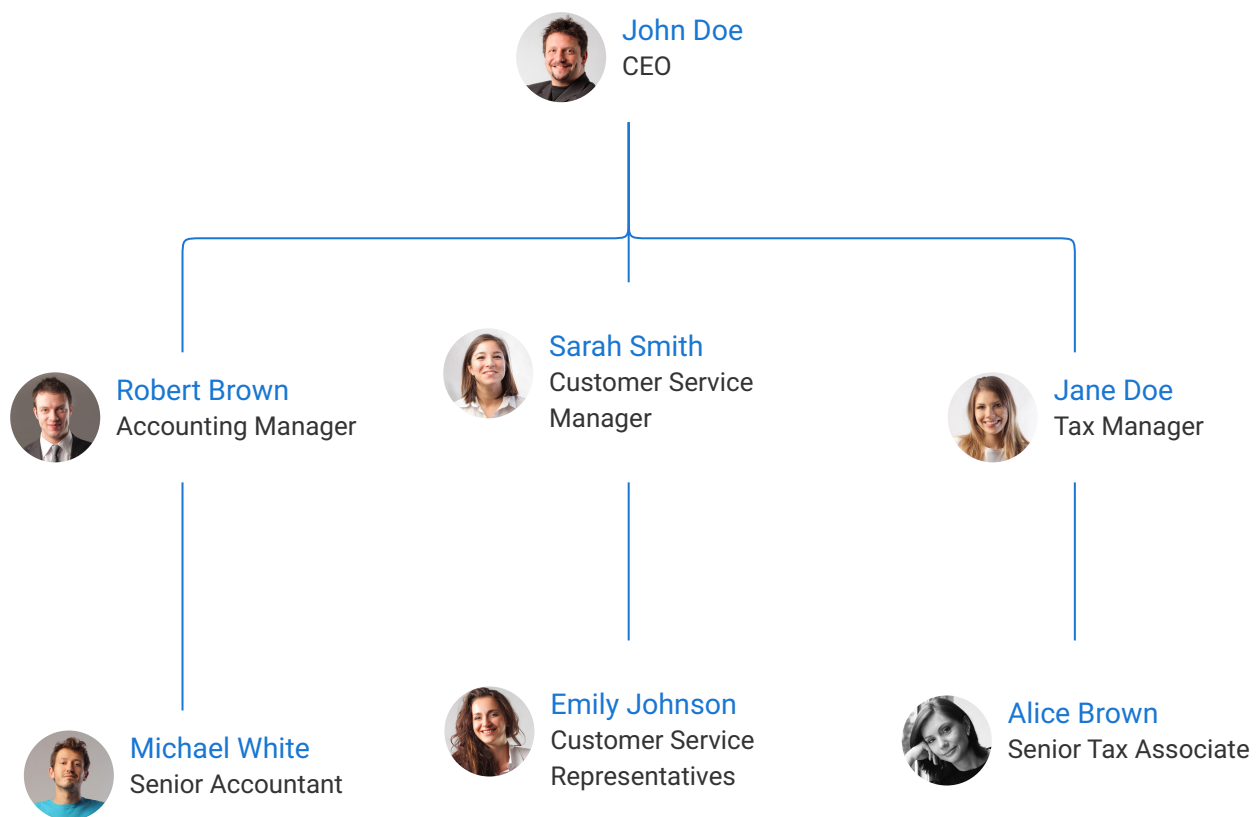
 **Tax Preparation Business Plan**

Explain the organizational structure of your management team. Include the reporting line and decision-making hierarchy.

To unlock help try Upmetrics! 


Start writing here..

Organization chart




Compensation plan

 **Help tip**

 **Tax Preparation Business Plan**

Describe your compensation plan for the management and staff. Include their salaries, incentives, and other benefits.

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Start writing here..

 **Help tip**

Mentioning advisors or consultants in your business plans adds credibility to your business idea.

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Advisors/Consultants



MICHAEL JOHNSON

Legal Advisor - michael.johnson@example.com

Michael provides legal counsel to ensure that our business operations comply with all relevant laws and regulations.



SARAH GREEN

Financial Consultant - sarah.green@example.com

Sarah assists in financial planning and analysis to help us make informed business decisions.

8.

Financial Plan



REMEMBER

When writing the financial plan section of a business plan, it's important to provide a comprehensive overview of your financial projections for the first few years of your business, You may provide the following:

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Help tip

Tax Preparation Business Plan

To create an effective introduction for your "Financial Plan" chapter, begin by stressing the critical role of a well-structured financial plan in the success of your venture.

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Start writing here..

Help tip

Tax Preparation Business Plan

The cash flow for the first few years of your operation should be estimated and described in this section. This may include billing invoices, payment receipts, loan payments, and any other cash flow statements.

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Profit & loss statement

	2023-24	2024-25	2025-26	2026-27	2027-28
Revenue	\$0	\$0	\$0	\$0	\$0

	2023-24	2024-25	2025-26	2026-27	2027-28
Cost Of Sales	\$0	\$0	\$0	\$0	\$0
General Costs	\$0	\$0	\$0	\$0	\$0
Revenue Specific Costs	\$0	\$0	\$0	\$0	\$0
Personnel Costs (Direct Labor)	\$0	\$0	\$0	\$0	\$0
Gross Margin	\$0	\$0	\$0	\$0	\$0
Gross Margin (%)	0%	0%	0%	0%	0%
Operating Expense	\$0	\$0	\$0	\$0	\$0
Payroll Expense (Indirect Labor)	\$0	\$0	\$0	\$0	\$0
General Expense	\$0	\$0	\$0	\$0	\$0
Bad Debt	\$0	\$0	\$0	\$0	\$0
Amortization of Current Assets	\$0	\$0	\$0	\$0	\$0
EBITDA	\$0	\$0	\$0	\$0	\$0

	2023-24	2024-25	2025-26	2026-27	2027-28
Additional Expense	\$0	\$0	\$0	\$0	\$0
Long Term Depreciation	\$0	\$0	\$0	\$0	\$0
Gain or loss from Sale of Assets	\$0	\$0	\$0	\$0	\$0
EBIT	\$0	\$0	\$0	\$0	\$0
Interest Expenses	\$0	\$0	\$0	\$0	\$0
EBT	\$0	\$0	\$0	\$0	\$0
Income Tax Expense	\$0	\$0	\$0	\$0	\$0
Total Expense	\$0	\$0	\$0	\$0	\$0
Net Income	\$0	\$0	\$0	\$0	\$0
Net Income (%)	0%	0%	0%	0%	0%
Retained Earning Opening	\$0	\$0	\$0	\$0	\$0
Owner's Distribution	\$0	\$0	\$0	\$0	\$0

	2023-24	2024-25	2025-26	2026-27	2027-28
Retained Earning Closing	\$0	\$0	\$0	\$0	\$0

💡 Help tip

📄 Tax Preparation Business Plan

The cash flow for the first few years of your operation should be estimated and described in this section.

This may include billing invoices, payment receipts, loan payments, and any other cash flow statements.

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Cash flow statement

	2023-24	2024-25	2025-26	2026-27	2027-28
Cash Received	\$0	\$0	\$0	\$0	\$0
Cash Paid	\$0	\$0	\$0	\$0	\$0
COS & General Expenses	\$0	\$0	\$0	\$0	\$0
Salary & Wages	\$0	\$0	\$0	\$0	\$0
Interest	\$0	\$0	\$0	\$0	\$0
Sales Tax	\$0	\$0	\$0	\$0	\$0
Income Tax	\$0	\$0	\$0	\$0	\$0

	2023-24	2024-25	2025-26	2026-27	2027-28
Net Cash From Operations	\$0	\$0	\$0	\$0	\$0
Assets Sell	\$0	\$0	\$0	\$0	\$0
Assets Purchase	\$0	\$0	\$0	\$0	\$0
Net Cash From Investments	\$0	\$0	\$0	\$0	\$0
Amount Received	\$0	\$0	\$0	\$0	\$0
Loan Received	\$0	\$0	\$0	\$0	\$0
Common Stock					
Preferred Stock	\$0	\$0	\$0	\$0	\$0
Owner's Contribution	\$0	\$0	\$0	\$0	\$0
Amount Paid	\$0	\$0	\$0	\$0	\$0
Loan Capital	\$0	\$0	\$0	\$0	\$0
Dividends & Distributions	\$0	\$0	\$0	\$0	\$0
Net Cash From Financing	\$0	\$0	\$0	\$0	\$0

	2023-24	2024-25	2025-26	2026-27	2027-28
Summary					
Starting Cash	\$0	\$0	\$0	\$0	\$0
Cash In	\$0	\$0	\$0	\$0	\$0
Cash Out	\$0	\$0	\$0	\$0	\$0
Change in Cash	\$0	\$0	\$0	\$0	\$0
Ending Cash	\$0	\$0	\$0	\$0	\$0

💡 Help tip

📄 Tax Preparation Business Plan

Create a projected balance sheet documenting your tax preparation business's assets, liabilities, and equity.

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Balance sheet

	2023-24	2024-25	2025-26	2026-27	2027-28
Assets	\$0	\$0	\$0	\$0	\$0
Current Assets	\$0	\$0	\$0	\$0	\$0

	2023-24	2024-25	2025-26	2026-27	2027-28
Cash	\$0	\$0	\$0	\$0	\$0
Accounts Receivable	\$0	\$0	\$0	\$0	\$0
Inventory	\$0	\$0	\$0	\$0	\$0
Other Current Assets	\$0	\$0	\$0	\$0	\$0
Long Term Assets	\$0	\$0	\$0	\$0	\$0
Gross Long Term Assets	\$0	\$0	\$0	\$0	\$0
Accumulated Depreciation	\$0	\$0	\$0	\$0	\$0
Liabilities & Equity	\$0	\$0	\$0	\$0	\$0
Liabilities	\$0	\$0	\$0	\$0	\$0
Current Liabilities	\$0	\$0	\$0	\$0	\$0
Accounts Payable	\$0	\$0	\$0	\$0	\$0
Income Tax Payable	\$0	\$0	\$0	\$0	\$0
Sales Tax Payable	\$0	\$0	\$0	\$0	\$0
Short Term Debt	\$0	\$0	\$0	\$0	\$0
Long Term Liabilities	\$0	\$0	\$0	\$0	\$0
Long Term Debt	\$0	\$0	\$0	\$0	\$0


	2023-24	2024-25	2025-26	2026-27	2027-28
Equity	\$0	\$0	\$0	\$0	\$0
Paid-in Capital	\$0	\$0	\$0	\$0	\$0
Common Stock	\$0	\$0	\$0	\$0	\$0
Preferred Stock	\$0	\$0	\$0	\$0	\$0
Owner's Contribution	\$0	\$0	\$0	\$0	\$0
Retained Earnings	\$0	\$0	\$0	\$0	\$0
Check	\$0	\$0	\$0	\$0	\$0

 **Help tip**

 **Tax Preparation Business Plan**

Determine and mention your business's break-even point—the point at which your business costs and revenue will be equal.

This exercise will help you understand how much revenue you need to generate to sustain or be profitable.

To unlock help try Upmetrics! 

Break-even Analysis

	2023-24	2024-25	2025-26	2026-27	2027-28
Starting Revenue	\$0	\$0	\$0	\$0	\$0

	2023-24	2024-25	2025-26	2026-27	2027-28
Net Revenue	\$0	\$0	\$0	\$0	\$0
Closing Revenue	\$0	\$0	\$0	\$0	\$0
Starting Expense	\$0	\$0	\$0	\$0	\$0
Net Expense	\$0	\$0	\$0	\$0	\$0
Closing Expense	\$0	\$0	\$0	\$0	\$0
Is Break Even?	0	0	0	0	0
Break Even Month	0	0	0	0	0
Days Required	0	0	0	0	0
Break Even Revenue	\$0	\$0	\$0	\$0	\$0
Break Even Units					

Financing needs

💡 Help tip

📄 Tax Preparation Business Plan

Calculate costs associated with starting a tax preparation business, and estimate your financing needs and how much capital you need to raise to operate your business.

To unlock help try Upmetrics! 🔒

Start writing here..

Upmetrics vs Financial Spreadsheets

Spreadsheets can be a powerful tool for preparing complex financial reports and forecasts. However, using them can be quite time-consuming, intimidating, and frustrating.



The screenshot displays the Upmetrics 'Financial Plan' interface. On the left, there are navigation buttons for 'Profit & Loss', 'Balance Sheet', and 'Cash Flow'. The main area shows a 'Profit & Loss' statement for the year 2023-04. Below this, a calculator asks 'What price will you charge for each unit?' with a 'Calculate Amount' button and a 'View previous calculations' link. The results show a price of \$40 per unit.

	2023-04	2024-04
Revenue	\$245,391	\$161,811
Cost of Sales	\$18,608	\$27,238
Gross Margin	\$196,784	\$134,574
Gross Margin (%)	80.2%	83.2%
Operating Expenses	\$294,379	\$118,967
	1814	\$15,279
	3.2%	\$6,657.01
	0.2%	\$121,895.01
	7.2%	\$6,621.00
	.18%	3,386
	7.2%	\$184,675.77



Upmetrics could be your way out of boring & clumsy spreadsheets. Simply enter the numbers, and get accurate and easy-to-understand financial reports made in minutes - no more remembering complex formulas or fussing in the spreadsheet.

[Start your planning today](#)

9.

Appendix



REMEMBER

When writing the appendix section, you should include any additional information that supports the main content of your plan. This may include financial statements, market research data, legal documents, and other relevant information.

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Mariia Yevlash



Student, Sumy State University – Ukraine

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