

TAX BLUEPRINT

PREPARED FOR

[CLIENT NAME(S)]

[Entity Name] ([Entity Type]) | Tax Year [YYYY] | Prepared [Month YYYY]

Confidential | For Discussion Purposes Only | CPA Review Required Before Implementation

1. Executive Summary

[One tight paragraph: what we reviewed, what's driving the current tax result, biggest opportunity, and the estimated combined savings range, if available.]

AREA	ACTION	PRIORITY	ESTIMATED IMPACT
[Planning item 1 — e.g., Officer Compensation]	Implement	High	[Description + ~$X,XXX impact]
[Planning item 2 — e.g., Retirement Plan Design]	Confirm & Document	High	[Description + ~$X,XXX impact]
[Return completeness item]	Discuss with CPA	Medium	[Risk reduction — not a dollar estimate]
[Time-sensitive item — e.g., Estimated Payments]	Increase Now	Urgent	[Why this is time-sensitive]
[Future-year item]	Future Discussion	Medium	[Not modeled this cycle]

2. Analysis of Prior Periods

[Tax Year] Return Summary

ITEM	AMOUNT	NOTE
Filing Status	[MFJ/MFS/Single/HOH]	—
Total Income	[$XXX,XXX]	[Wage + business/K-1 breakdown]
Adjusted Gross Income	[$XXX,XXX]	[Above-the-line adjustments, if any]
Taxable Income	[$XXX,XXX]	[After standard/itemized + QBI]
Federal Total Tax	[$XX,XXX]	[Effective rate; SE tax note]
[State] Net Tax	[$X,XXX]	[PTET / allocation note if applicable]
Combined Balance Due	[~$XX,XXX]	[Withholding + penalty note]
Prior-Year Estimated Payments	[$X,XXX or $0]	[Note if none were made]

Return Review — Items Requiring Attention

ITEM	OBSERVATION
[Completeness item — e.g., Corporate Return Acceptance]	[The documents reviewed did not include… This should be confirmed with your preparer.]
[Documentation item — e.g., Bookkeeping Records]	[Neutral, cautious phrasing — 'we recommend establishing…']
[Reconciliation item — e.g., Vehicle Titling]	[Should be reconciled with your preparer.]
[Allocation item — e.g., State Income Allocation]	[Should be reviewed for accuracy.]

3. Recommendations

The action items below are grouped by timing — immediate items, compliance cleanup, and future-year strategy — but numbered continuously as one list. Only items with a dollar impact or a client decision appear here; purely administrative items are in Section 5.

#	RECOMMENDATION	DETAIL
IMMEDIATE ITEMS		
1	**[Recommendation title]** *[Timing, e.g., 2026 payroll]*	[Why it matters + $ impact if applicable. 3–5 sentences max.]
2	**[Recommendation title]** *[Timing]*	[Detail. Estimated savings: ~$X,XXX/year.]
COMPLIANCE & CLEANUP		
3	**[Recommendation title]** *[Timing]*	[Detail — administrative/risk item.]
FUTURE-YEAR STRATEGY		
4	**[Recommendation title]** *[Timing]*	[Not modeled this cycle — future opportunity.]

4. Projected Savings

Scenario Comparison — [Tax Year] As Filed vs. Proposed

ITEM	AS FILED	PROPOSED	CHANGE
INCOME			
[Income line item]	[X]	[Y]	[Δ]
TOTAL INCOME	**[X]**	**[Y]**	**[Δ]**
DEDUCTIONS & TAXABLE INCOME			
[Deduction line item]	[X]	[Y]	[Δ]
TAXABLE INCOME	**[X]**	**[Y]**	**[Δ]**
FEDERAL TAX			
Regular income tax	[X]	[Y]	[Δ]
Credits	[X]	[Y]	[Δ]
Self-employment tax	[X]	[Y]	[Δ]
TOTAL FEDERAL TAX	**[X]**	**[Y]**	**[Δ]**
PAYMENTS & RESULT			
Withholding + estimated payments	[X]	[Y]	[Δ]
BALANCE DUE (per planner)	**[X]**	**[Y]**	**[Δ]**
[STATE] TAX — describe PTET/entity mechanics here in the divider label if applicable			
[State] tax — personal return (post-PTET-credit)	[X]	[Y]	[Δ]
[State] PTET — paid by [entity]	[X]	[Y]	Deductible at federal level — see above
Total [state] tax (personal + entity)	**[X]**	**[Y]**	**[Δ]**
COMBINED TOTAL TAX (Federal + State)			
COMBINED TOTAL TAX	**[X]**	**[Y]**	**[Δ]**

Projected savings: [narrative — total $ range and primary driver].

Assumptions: [key assumptions the scenario depends on — e.g., salary level finalized, election confirmed, figures as modeled].

5. Next Steps

- [Concrete action item — e.g., finalize retirement plan design]
- [Concrete action item — e.g., implement election]
- [Concrete action item — e.g., move payroll to platform]
- [Documents still needed from client]
- [Future-year strategy discussion item]

Important Notes

This Tax Blueprint is prepared for discussion purposes only, based on documents and information available at the time of preparation. It does not constitute a filed tax return, legal advice, or a guarantee of specific tax savings.

All projections are estimates based on current law and the assumptions stated herein, comparing the [tax year] return as filed against a fully modeled proposed scenario. Actual results will depend on final income, implementation timing, and confirmed figures noted throughout this report. [Add any engagement-specific pending-confirmation caveats here.] CPA review is required before implementation.