## **OUR CUSTOMER JOURNEY**

STAGE 2 STAGE 3 STAGE 4 STAGE 5 STAGE 1 **Onboarding** Tax Compliance Value Up: Full Access **Bookkeeping**  Financials Mastery & Reviews Needs Catch-up Consultation Filing Tax Assessment KPI Tracking and Forecasting Reconciliation & Advisory Returns Kick-Off Kick-Off Call Uncategorized Tax Projections List Review and Estimated Define Short-Term **Payments** Financials & Schedule and Chart of Long-Term Accounts Milestones & Review Tax Goals • Tax Planning & Projections Monthly Identify All Scenario Modeling bookkeeping City, State, and Deduction & Federal Tax Reimbursement Strategies Requirements Compliance Monitoring Retirement Planning & Tax **Deferred Strategies** 



