

The image features the TaxPlanIQ logo centered within a large, thin white circular arc. The logo itself consists of the text "TaxPlanIQ" in a bold, dark blue sans-serif font. The "i" in "Plan" is a solid blue vertical bar, and the "Q" is a blue circle with a white face-like shape inside, including two dots for eyes and a small circle on top. The background is a light blue gradient, decorated with various abstract geometric elements: a thick blue curved shape in the top left, a solid yellow circle on the left, two parallel blue diagonal lines in the upper left, a blue circle in the top right, and a blue circle in the bottom right. A thin yellow line segment is also visible in the bottom right area.

TaxPlanIQ

But few actually
SUCCEED...



What's MISSING?

A Repeatable & Scalable Advisory Model



That's Exactly What I Did!

I made the choice to focus on advisory and tax planning.

My firm grew from \$350k to \$1M in just 3 years while reducing work hours by 90%.



Dr. Jackie Meyer, CPA
Founder & President of
TaxPlanIQ

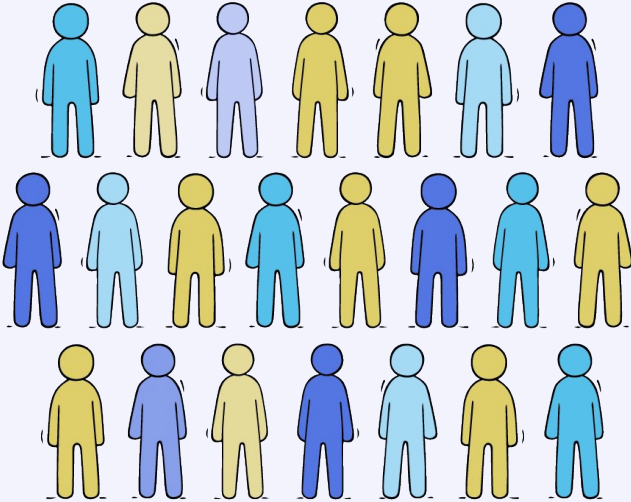
Tax Planning is the Smartest and Easiest On-Ramp to Advisory...It's the GROWTH ENGINE!

Why?

- You already have the data and initial clients
- Your clients are likely overpaying in taxes
- And they're *desperate* for real help

The Math— 1 vs. 22

22 tax prep clients



\$218 avg fee

vs.

1 tax planning client



\$4,800 avg fee

**Clients are happier,
stay longer, refer more...**

**And you position yourself
as a true advisor.**



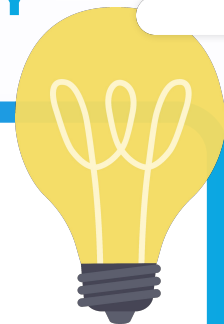
OLD WAY

- Tax prep, bookkeeping
- Low ticket, low margin
- Low value to client
- Commoditized service
- 50-60 hour weeks
- Highly seasonal
- 9.1% YoY avg revenue growth

TaxPlanIQ bridges from old to new

NEW WAY

- Tax planning, advisory
- High ticket, high margin
- High value to client
- Holistic approach
- Easier work weeks
- Recurring revenue
- Up to 50% YoY revenue growth



Let's Take a Look at TaxPlanIQ!

Tax Planning with TaxPlanIQ Solves All of Your Challenges

Work Less And Earn More!

Not enough time in the day [burnout]

Tax Planning and using **TaxPlanIQ** to do 90% of the work saves you time and allows you to add more profitable clients with less work.

Improving profit margins

1 Tax Planning Client = 22 Tax Prep client in revenue. Your margins explode with Tax Planning. Just imagine how much you can grow your revenue with your current clients alone!

Getting new clients

Tax Planning separates you in the marketplace and gives you the ability to show a clear ROI in doing business with you for clients.

Client Retention [ensuring a high satisfaction]

Tax Planning saves clients taxes and puts more money in their pockets proactively - exactly what they are craving and want from their trusted advisor.

Staffing

If you have higher profit margins, you can take on less clients and choose the clients you want solving the need to add staff for growth.

TaxPlanIQ

Standard Plan

\$697/month

What's Included

- ✓ 2 Users
- ✓ Complimentary Enhanced Implementation and Training (\$750 value)
- ✓ Unlimited tax plans and proposals per user
- ✓ Automated 1040 upload, analysis, and tax strategy recommendations
- ✓ jAlne AI Tax Planning Assistant
- ✓ Tax Strategy Hub with 125+ tax strategies including use cases, pros, cons, implementation checklists, IRS references
- ✓ Custom white labeled reports and tax plans
- ✓ Client portal
- ✓ Access to weekly Tax Labs with TaxPlanIQ's Concierge Consultants
- ✓ Monthly Power Hour tax strategy webinars hosted by TaxPlanIQ Concierge Consultants
- ✓ Chat, Email & Phone Support

Imagine if you could have all of that,
plus an expert tax consultant
available to help with your business?

TaxPlanIQ

Growth Plan

All of this, plus having expert consultants at your fingertips on a weekly basis would normally cost **thousands of dollars/month**, but we're offering it for **just \$997!**

What's Included

- ✓ **Everything in the Standard Plan Plus...**
- ✓ 5 users
- ✓ TaxPlanIQ Concierge Consultant Premium Support for all users
- ✓ 1:1 office hours with TaxPlanIQ Concierge Consultants to review tax plans and ensure best practices
- ✓ Live Weekly Q&A and training sessions from marketing to selling and implementing plans, workflows to tax law, and tech updates
- ✓ Monthly CPE credits via Tax Labs, Power Hours, Weekly Office Hours (36 per year per user)
- ✓ First access to beta features (free while in beta, then discounted)
- ✓ Special Growth Plan only events

**And if that is not enough,
The Growth Plan comes with a
100% Money Back Guarantee!**

TaxPlanIQ Growth Plan

100% MONEY BACK GUARANTEE

The TaxPlanIQ Growth Plan will pay for itself within the first 12 months, via tax planning fees generated from client sales. If you meet the conditions outlined below and do not see a return on 100% of your investment in the Growth Plan subscription, you will qualify for a full refund of your first year subscription.

Conditions:

- 1. Training Participation:** At least one user must complete 12 TaxPlanIQ Growth Plan Trainings within the 12 month subscription period.
- 2. Tax Plan Presentation:** The user must present at least 10 Tax Plans to verifiable clients or prospects* within the 12 month subscription period.
- 3. Tax Plan Review:** Engage with a TaxPlanIQ Concierge Consultant for a 1:1 review of at least 5 Tax Plans, which must be presented to verifiable clients or prospects* within the 12 month subscription period.

*Verifiable client or prospect presentations include documented proof of a meeting and written decision (yes or no to the tax plan) by the client.

SPECIAL THRIVEAL OFFER

Use code: THRIVEAL20.

GROWTH PLAN ACTUAL COST ~~\$997~~

\$797!

OVER \$2300 IN SAVINGS

OR

STANDARD PLAN ACTUAL COST ~~\$697~~

\$557!

OVER \$1600 IN SAVINGS

Deadline:
Sept 12th



Plus an additional 15% OFF if you pay in full for the year!

BONUS!

Tips on OB3

Simple Advisor Cheat Sheet

| AGI Level | Key Strategy Focus Area |
|-----------------------------|---|
| <\$150k Single / \$300k MFJ | Maximize tip/overtime exemptions, child credits, Trump accounts, seniors |
| \$150k-\$400k | SALT cap planning (stay under \$500K to preserve full \$40K), 529 plan front-loading, optimize mortgage & education deductions, layer charitable gifts while eligible. |
| \$400k-\$500k | Manage QBI phase-outs (SSTBs), charitable bunching, defer income, prepay expenses. Watch for retirement account contribution phase-outs. |
| >\$500k | SALT deduction begins phasing down 30¢ per \$1 over \$500K — use AGI compression strategies: entity restructuring, deferred comp, tax-loss harvesting. Evaluate QSBS eligibility, optimize S Corp elections, bonus depr |
| All business owners | Time 2025 purchases for 100% bonus depr, leverage R&D ded, and model QSBS or QOZ eligibility. Use TaxPlanIQ ROI Method™ to justify advisory fees. |

Advisor Checklist- Part 1

| Urgent Item | Action |
|---|--|
| Update Estate & Gift Strategies | Encourage wealthy clients to update their estate plans now. They can lock in these higher exemptions with gifts, GRATs, or other vehicles. Also review state estate taxes – higher federal exemptions might make state thresholds the new limiting factor (e.g., New York’s ~\$7M exemption) |
| Seize the 5-Year SALT Window | Identify clients (likely high earners in high-tax states) who <i>could</i> benefit. For those under the \$500k MAGI phase-out, plan to bunch property tax payments or state tax estimates into the 2025–2029 period to utilize the higher cap each year. |
| Advise on Capital Investments and Depreciation | Work with clients on cost segregation studies or asset purchase plans. Also consider if taking full expensing is always optimal—some clients may prefer smoothing income, so planning is key. Use software to run scenarios: full expensing vs. spreading out depreciation, especially now that there’s no sunset pressure to use bonus before it expires. |
| | |

Advisor Checklist- Part 2

| Urgent Item | Action |
|------------------------------------|--|
| Re-examine Choice of Entity | For each business client, model their 5-year tax under S vs C structure given the new law. Also factor in the permanent international provisions (if they have foreign income) |
| Tax-Advantaged Investments | Educate yourself and find vendors for now-permanent incentives: Opportunity Zones can be more heavily utilized. New Markets Tax Credit projects can be entered knowing credits will be available every year. QSBS planning: founders and investors should know that qualifying for Section 1202 is even more rewarding now |
| Calendar the Sunset Items | SALT boost, overtime/tip, and senior deductions vanish by 2029; schedule multi-year plans so clients capture benefits before they're gone |
| Educate & Communicate | Segment outreach: HNW (estate/SALT), business owners (expensing/QBI), seniors & tipped/OT workers (temporary deductions). Book 2025 strategy meetings w/tax package offer. Use 5 minute TaxPlanIQ RAP feature to produce report, then upsell with ROI. |

SPECIAL THRIVEAL OFFER

Use code: THRIVEAL20

GROWTH PLAN ACTUAL COST ~~\$997~~

\$797!

OVER \$2300 IN SAVINGS

OR

STANDARD PLAN ACTUAL COST ~~\$697~~

\$557!

OVER \$1600 IN SAVINGS

Deadline:
Sept 12th



Plus an additional 15% OFF if you pay in full for the year!

Exclusive for TaxPlanIQ Users:

Join Dr. Jackie Meyer, CPA's 10-Day Challenge

Close More High-Value Tax Plans Than Ever Before



- Starts September 22
- Complimentary for all new users who sign before September 21!

REGISTRATION INFO COMING SOON