|  |  |
| --- | --- |
|  | Tax planning observations and ideas |

The following are templates for individual and entity clients.

Individual clients

Date

Name

Address

City, state zip

Greeting:

Thank you for choosing firm name for your tax services. It is our honor to serve you with the highest level of attention and commitment to client satisfaction.

At firm name, we advocate a proactive approach to financial planning. We believe that you should have the tools you need to make important decisions now — choices that will impact your financial outlook today and in the long term. Taxes are a fact of life, but tax liability can be impacted — and often minimized significantly — with the right guidance.

In keeping with this philosophy, we carefully examine each client’s tax return to identify strategies for lowering taxable income, increasing deductions and identifying new or underutilized credits.

During the course of completing your tax return, we noted the following observations and recommendations:

* Observation and recommendation 1
* Observation and recommendation 2
* Observation and recommendation 3

A representative from firm name will contact you within time frame to address your questions or concerns about these observations. In addition to traditional CPA business, our firm offers professional expertise in a wide range of specialty consulting areas. We stand ready to help you understand your finances and plan ahead for a solid and successful future.

Thank you again for choosing firm name. We realize that you have many choices when selecting a CPA, and we appreciate your business.

Sincerely,

Partner name, credentials

Partner title

Entity clients

Date

Name

Title

Company

Address

City, state zip

Greeting:

Thank you for choosing firm name for your tax services. It is our honor to serve company with the highest level of attention and commitment to client satisfaction.

At firm name, we advocate a proactive approach to planning. We believe that you should have the tools you need to make important decisions now — choices that will impact company’s financial outlook today and in the long term. Taxes are a fact of life, but tax liability can be impacted — and often minimized significantly — with the right guidance.

In keeping with this philosophy, we carefully examine each client’s tax return to identify strategies for lowering taxable income, increasing deductions and identifying new or underutilized credits.

During the course of completing company’s tax return, we noted the following observations and recommendations:

* Observation and recommendation 1
* Observation and recommendation 2
* Observation and recommendation 3

A representative from firm name will contact you within timeframe to address your questions or concerns about these observations. In addition to traditional CPA business, our firm offers professional expertise in a wide range of specialty consulting areas. We stand ready to help you understand your organization’s finances and plan ahead for a solid and successful future.

Thank you again for choosing firm name. We realize that you have many choices when selecting a CPA, and we appreciate your business.

Sincerely,

Partner name, credentials

Partner title