

# Proactive Tax Planning Proposal

Date: [Insert Date]

To: [Client's Name]  
[Client's Address]  
[City, State, Zip Code]

Dear [Client's Name],

As we approach the end of the fiscal year, it is an opportune time to discuss proactive tax planning strategies that can benefit [Company Name]. Our goal is to identify potential tax-saving opportunities, minimize liabilities, and ensure compliance with current tax regulations.

## Overview of Proposed Strategies

- **Income Timing:** Strategies to defer income or accelerate expenses.
- **Entity Structure Review:** Assessing the effectiveness of current business structure for tax efficiency.
- **Utilization of Credits:** Identification and application of available tax credits.
- **Retirement Contributions:** Maximizing contributions to retirement plans to reduce taxable income.

## Next Steps

Please let us know your availability for a meeting to discuss these strategies in detail. It is crucial to take proactive steps now to optimize your tax position for the upcoming year.

Thank you for considering our services, and we look forward to assisting [Company Name] in achieving its financial goals.

Sincerely,

[Your Name]  
[Your Title]  
[Your Company Name]  
[Your Contact Information]