



**ATHERTON**  
& ASSOCIATES, LLP

Tax • Assurance • Consulting

# A BETTER APPROACH TO TAX PLANNING

## Planning Before Year-End

If income is increasing, prior-year tax results were unexpected, or decisions are being made without clear projections, it's time to move beyond basic preparation. Planning provides visibility into what's ahead—while there's still time to adjust.

## Connect Strategy to Results

A structured planning approach links financial performance with tax strategy. Instead of reacting after year-end, business owners gain direction on timing decisions, estimated payments, and actions that can reduce overall exposure.



### Financial Clarity

Planning starts with accurate, current financials. Without it, decisions are based on assumptions—not actual performance.



### Better Decisions

Income timing, expenses, and owner compensation all carry tax impact. Evaluating them together leads to stronger outcomes.



### Timely Action

Planning only works if decisions are implemented. Clear direction ensures adjustments are made before deadlines limit options.

## Move Beyond Preparation.

Atherton's tax team helps identify opportunities and take action before year-end decisions are locked in.

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