


WhipSmart CEO DESKTOP VERSION



Cassie Kirwan, Tax Strategist

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The WhipSmart CEO Tax Strategy

A Comprehensive High-Touch
Advisory Program for Entrepreneurs
Ready To Stop Reacting at Tax Time
& Save Proactively All Year Long



Cassie Kirwan

SCHEDULE A CALL

You're Working *WAY* Too Hard to Be Surprised at Tax Time

Fact:

What You Do *Right Now* Determines What You Pay Next Year

This isn't about tax prep.

It's about tax **power**.

If tax season keeps sneaking up on you...

And you keep promising yourself "next year I'll get more organized"...

Let's fix that.





This Is More Than a Tax Service. It's a Year-Long Strategic Partnership.

The WhipSmart CEO Tax Strategy is for business owners who want to stop playing catch-up and start building a smarter, smoother, more profitable year, with **every financial decision** working for you, not against you.

Because smart CEOs do just react in April. They plan all year long.

Here's What You'll Learn and Implement:

01

Build a Custom Tax Strategy That Saves You Thousands

No more last-minute scrambling or surprise bills. You'll have a 12-month roadmap for estimated payments, deductions, and smart cash flow decisions.

02

Set Up Your Business to File Like a CEO

From entity optimization to quarterly check-ins, you'll make the most of every legal tax advantage available to small businesses.

03

Plan Ahead and Stay on Track

Stop pulling up to the finish line at the last minute and start planning ahead. We'll meet quarterly to review your financials and make

adjustments, but in addition to that we'll strategize the best plan to ensure you keep the maximum amount of money possible.

04

Understand Your Numbers Like a Boss

You'll finally know what's going on with your money and how to make it work harder for you.

05

End the Year Stress-Free

No panic, no paperwork pileups. Just clarity, savings, and whipsmart CEO confidence that you can celebrate.

Right now you're compliant.

That's great.

Tax Prep is about compliance.

The problem is - compliance is not the same as planning.

Tax Strategy is about getting ahead.

SCHEDULE A CALL

Save 40% while space is available. All bonuses included.

 *What's Included* 

This isn't a one-time filing.

It's your all-access annual tax strategy system.

Filing taxes is reporting what already happened.

This program is strategic. It's about **building a plan that helps you reduce your tax liability for the coming year.**

01

Personalized Tax Plan & Roadmap

Beyond estimated payments, your business and financial goals need a customized plan for true growth.

02

Quarterly Strategy Sessions

Stay ahead of tax law changes and shifting income for 2026.

03

Year-End Review + Filing Prep Support

No more scrambling, you'll be smiling in April while everyone else is pulling out their hair.

04

Ongoing Access & Email Support

Ask the hard questions anytime throughout the year and get *personalized* advice from a trusted expert.

05

Proactive Alerts

Get reminders for key tax deadlines so nothing slips through the cracks.

You're Not a Mess, *But Your Tax Plan Might Be*

You won't just learn how to track your income and expenses, you'll get tools you can use ongoing to plan finances, eliminate risks, avoid mistakes and see the long-term vision for your business income - *like a WhipSmart CEO.*

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This Is For You If...

You're done with the bare-minimum version of taxes. No more filing last-minute, hoping you got it right, and just accepting whatever the IRS says you owe.

You want to **keep more of what you earn** by planning ahead.

You want a tax plan that aligns with your business goals - not just a stack of receipts handed to a tax preparer once a year.

You're ready to eliminate surprises, avoid costly mistakes... and finally understand how **taxes can work for you** instead of against you.

Once you put a proactive tax strategy in place - one that protects profits and builds wealth - **you stop playing defense and start leading like a confident CEO.**

This program is best for:

- Small business owners and freelancers ready to take tax planning seriously
- Entrepreneurs who want to save hundreds (if not thousands) with proactive strategy
- CEOs tired of “winging it” and ready to feel financially confident all year long
- Anyone who’s ever said, “I just want someone to tell me exactly how to plan my finances and what to do about my taxes.”
- Anyone who is ready to level up your CEO status to “WhipSmart”!

If that's you...

*Introducing the WhipSmart CEO
Founding Member Experience*

For a limited time, I am opening 10 spots for
The Whipsmart CEO Tax Strategy.

You'll get:

Full access to the complete year-long program

Hands-on support and quarterly strategy calls

40% off the full \$4,500 rate — just \$2,700 for the first 10 members

Plus: Direct collaboration with me on how we work together which
will help me to shape the final program.

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**Change the way you approach your finances and taxes
forever. Get WhipSmart!**



Clients Who See the Big Picture, Reduce Risk & Keep More of Their Money

These are all people who used to panic before tax-time. Now, they own it like pros.



"Cassie took the time to explain everything in a way that made sense, making our work smooth and

stress-free. I really appreciated her attention to detail and how much she genuinely cares about getting everything right. I highly recommend her to anyone looking for a great tax partner!"

– Karen C.



"Cassie really dug into my information and books to maximize our deductions. She saved us 8K in our tax returns this year. I cannot recommend her enough for families with multiple W2 and business owners!"

– Valeria U.



“Cassie has been absolutely amazing to work with. Her attention to detail and truly looking out for her client is top notch. I would highly recommend Cassie and her financial services.”

– Matt O.



“Cassie did an amazing job helping me organize my finances and tax plan. She was professional, efficient, and made everything so easy to understand. Best of all, I got back a great return! ”

– Pamela M.

The Bonuses

3 Strategic Tools to Round
Out Your Tax Strategy and
Make Implementation
Easier

Because planning smarter deserves a few perks:

As a Founding Member of the Whipsmart CEO Tax Strategy, you're also getting three exclusive resources designed to help you navigate your finances with ease.



Bonus #1



Bonus #2



Bonus #3

“Tax-Ready Toolkit”

enjoy building your health with a workbook of templates that make expense tracking and estimated payment planning easy.

Value: \$195 (Free)

Ask-a-Pro Access

Skip the second-guessing. Get answers to your toughest tax and financial questions all year long, so you can make smart decisions with confidence.

Value: \$1495 (Free)

Complimentary Review of New Tax Laws (BBB)

Research and develop custom financial strategies that proactively applies new laws to your unique business.

Value: \$295 (Free)

(Total bonus value: \$1,985 — included free with Founding Member enrollment.)

Become WhipSmart!



Why I Created This Program

"I've seen too many small business owners lose money because they were unprepared. I built The Whipsmart CEO Tax Strategy to give you a system and a way to keep more of what you earn, without the stress, guesswork, or tax-time panic."

— Cassie Kirwan, Tax Strategist & Founder of Kirwan Financial

Let's Make This Your Most Profitable Year Yet

You don't need another accountant who only steps in at tax time. You're ready for a strategic partner who helps you plan ahead, save smart, and feel confident about your numbers.

Applications close once 10 spots are filled.



On the fence? Need help deciding if this program is right for you? Let's chat.

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Questions & Answers

► **Question:** What happens after I join?

Answer: You'll immediately get access to onboarding, a welcome packet, and your first-year prep checklist. Then, you'll schedule your first kickoff call in December to set up your 2026 tax plan.

► **Question:** Is this just for established businesses?

Answer: Not at all. Whether you're a solo freelancer or have a growing team, this strategy is about building smarter financial habits that grow with you and ensuring you're ahead of the game so you keep more of the money you make.

► **Question:** What's expected of me as a Founding Member?

Answer: You'll provide monthly feedback (a quick 5-minute form) and share a testimonial at the end of your year — that's it. Your insight will help shape the evolution of the program.

► **Question:** Can I pay in installments?

Answer: Yes! Enjoy 12 monthly payments of \$275 or pay in full (\$2,700) and save 5% PLUS get a BONUS 60-minute strategy session.

► **Question:** Can I meet with you for a chat to figure out if this is right?

Answer: Of course! I offer a complimentary 15-minute Discovery Call where I can learn more about your business and help you decide.

Didn't find the answer you were looking for? We've got you.
[Reach out here](#) and let's get your question answered.



A Note From Cassie

Hey there,

If you've ever found yourself dreading tax season or wondering if you're truly doing enough to keep more of what you earn, I get it. I've seen too many smart, hard-working tax payers lose

thousands simply because they didn't have the right plan in place soon enough.

That's exactly why I created The WhipSmart CEO Tax Strategy; to take the stress and guesswork out of taxes and turn it into a year-round strategy that actually works for you.

This isn't about quick fixes or waiting until April to figure it all out. It's about helping you understand your numbers, make smarter financial decisions, and create a system that gives you peace of mind every single quarter.

If you're ready to finally take control of your business finances, not just at tax time, but all year long then this is for you. Together, we'll build a plan that fits your business and your goals.

Let's make this the year you stop playing catch-up and start leading your business like a WhipSmart CEO.

xo, Cassie Kirwan

Stop dreading tax season.

Start leading your business like a *WhipSmart* CEO.

**Schedule a Call and transform your finances
with a solid Tax Strategy!**

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About Cassie Kirwan



Cassie Kirwan is a financial strategist, tax preparer, and the creator of The WhipSmart CEO Tax Strategy.

After 7 years seeing clients make costly mistakes by leaving their tax planning until the last minute, she made it her mission to help small business owners and service providers skip the overwhelm and craft a simple plan that saves them hundreds to thousands when they

file like a boss!

Cassie blends financial strategy with a deep real-world understanding of how business taxes can affect your bottom line. When she's not helping clients, you can find her at the beach with her husband and 4 adorable children.

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Get 40% Off while spots last & start 2026 ready for growth!

This Is For You If...

Ever feel overwhelmed when tax season rolls around?

Or unsure that you're managing your finances to eliminate risk and save
the maximum of what you earned?

If you've felt rushed, messy and unclear that your tax payments are
aligned with your financial goals, **then this program is for you.**

Once you set up your financial strategy to reflect your goals *and* protect your bottom line, you'll never feel lost again.

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