

Tax Express Consultation Planning Sheet

Helping Idaho Businesses Find Clarity & Relief

This worksheet helps you think more clearly about your business decisions—not just about bookkeeping, but any area where you feel pulled in too many directions. You don't need to have your answers "figured out." This is simply a space to reflect, reset, and prepare for your free consultation.

Strategy Focus: What's Stressing You Now?

• The decision I've been putting off is: _____

• What's unclear or messy in my books, money, or business structure?

• What questions would I love answered in the free session?

Strategy Focus: What Do You Want More Of?

• What could be easier or faster in my workflow if I had help?

• If my books were always up to date, I would:

Sleep better

Make decisions faster

Feel more in control

File taxes with confidence

Something else: _____

Reflection

Complete this sentence to gain clarity before we meet:

"If I could say just one really clear 'no' right now, it would be:"

No, _____

Note Your Appointment Details

Date: _____

Time: _____

Location: Phone | Video | In-Person (circle one)

Ready to Schedule?

You don't have to turn this sheet in — it's for your eyes and insight.
But it will help guide our time together and make your consultation even more valuable.

Not scheduled yet? You can do that here:

 Book Your Free Consultation:


https://app.acuityscheduling.com/schedule.php?owner=24014241&ref=embedded_csp

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