VALHALLA
TAX & FINANCE LLC
TAX PLANNING • TAX PREPARATION • TAX RESOLUTION • FINANCIAL COACHING

TAX EFFICIENCY ASSESSMENT™

Discover opportunities to reduce your tax burden and keep more of what you earn.

2 MINUTE ASSESSMENT
12 QUESTIONS

Answer the following 12 questions to get your personalized Tax Efficiency Score™.
All answers are confidential.

1 Which of the following best describes you?
(Select all that apply)

- ☐ W-2 employee
- ☐ Business owner
- ☐ Self-employed / 1099 income
- ☐ Partner in a partnership
- ☐ Shareholder in an S corporation
- ☐ Retired
- ☐ Other

2 What is your approximate annual household income?

- ○ Under $100,000
- ○ $100,000 – $149,999
- ○ $150,000 – $249,999
- ○ $250,000 – $399,999
- ○ $400,000 – $599,999
- ○ $600,000+

3 Which of the following apply to you?
(Select all that apply)

- ☐ I own rental or investment real estate
- ☐ I have a significant taxable investment portfolio
- ☐ I receive income from multiple sources
- ☐ I expect significant capital gains or investment sales
- ☐ None of the above

4 Where are you in relation to retirement?

- ○ More than 10 years from retirement
- ○ 5 – 10 years from retirement
- ○ Less than 5 years from retirement
- ○ Recently retired
- ○ Retired for several years
- ○ Not applicable / retirement isn't a current concern

5 When was the last time you reviewed the tax strategy for your retirement accounts?

- ○ Within the past 12 months
- ○ 1 – 3 years ago
- ○ More than 3 years ago
- ○ Never
- ○ I'm not sure
- ○ I don't currently have retirement accounts

6 Do you have a tax professional who proactively reviews your tax situation during the year—not just when preparing your return?

- ○ Yes, we meet proactively during the year
- ○ Occasionally, but not consistently
- ○ No, we primarily communicate at tax-filing time
- ○ I prepare my own return / don't currently have a tax professional

7 Do you have a tax projection completed during the year to estimate your tax liability before year-end?

- ○ Yes, every year
- ○ Some years
- ○ Only when something significant changes
- ○ No
- ○ I'm not sure what a tax projection is

8 Before making major financial decisions, how often do you consider the tax consequences or consult a tax professional?

- ○ Always
- ○ Usually
- ○ Sometimes
- ○ Rarely
- ○ Never

Examples: selling investments or real estate, changing jobs, retiring, starting or selling a business, taking retirement distributions, exercising stock options, receiving an inheritance, etc.

9 How often do you review whether you're taking full advantage of available deductions, tax credits, and tax-advantaged savings opportunities?

- ○ Annually
- ○ Occasionally
- ○ Only at tax-filing time
- ○ Rarely or never
- ○ I'm not sure

10 If you own a business or have self-employment income: How recently have you had a comprehensive review of your business tax strategy—not just preparation of the business tax return?

- ○ Within the past 12 months
- ○ 1 – 3 years ago
- ○ More than 3 years ago
- ○ Never
- ○ I'm not sure what a business tax strategy review includes
- ○ Not applicable

If not applicable, please select **"Not applicable"**.

11 If you have taxable investments, real estate, or other appreciated assets: How often are tax consequences considered before selling investments, real estate, or other appreciated assets?

- ○ Routinely
- ○ Sometimes
- ○ Rarely
- ○ Never
- ○ I'm not sure
- ○ Not applicable

If not applicable, please select **"Not applicable"**.

12 How confident are you that you're currently taking advantage of the tax strategies available to you?

- ○ Very confident
- ○ Somewhat confident
- ○ Unsure
- ○ Not very confident
- ○ Not confident at all

YOUR ANSWERS ARE 100% CONFIDENTIAL.
Based on your responses, you'll receive your personalized Tax Efficiency Score™ and see where the greatest opportunities may exist.

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