VALHALLA
TAX & FINANCE

THE VALHALLA TAX EFFICIENCY SCORE™
TAX EFFICIENCY ASSESSMENT

Discover Opportunities. Reduce Taxes. Build Wealth.

1 ABOUT THIS ASSESSMENT

This 2-minute self-assessment is designed to help you identify potential tax planning opportunities that may be available to you.

How It Works:
Check every statement that applies to you.
Give yourself **1 point** for each **YES** answer.

Your information is kept confidential and will only be used to provide your Tax Efficiency Score.

2 TAX EFFICIENCY CHECKLIST

#	Statement	YES (1 POINT)
1	I own a business or have self-employment income.	☐
2	My household income exceeds $150,000 annually.	☐
3	I owed taxes or received a refund over $2,000 last year.	☐
4	My income has changed significantly this year.	☐
5	I have sold (or plan to sell) investments, cryptocurrency, or real estate.	☐
6	I am within 10 years of retirement.	☐
7	I have not reviewed my tax withholding this year.	☐
8	I don't know what my projected tax liability will be this year.	☐
9	I want to legally reduce my taxes before year-end.	☐
10	I expect my income to increase or decrease significantly in the next few years.	☐
11	I have retirement accounts (401(k), IRA, 403(b)) and have never reviewed future tax consequences.	☐
12	I am concerned about taxes on Social Security, retirement withdrawals, or future RMDs.	☐
13	I own a business and have not reviewed my tax strategy beyond filing my return.	☐
14	I have never had a proactive tax planning meeting.	☐
	TOTAL YES ANSWERS (YOUR SCORE):	

3 CLIENT INFORMATION

Full Name: ____________________

Email: ____________________

Phone: ____________________

Best Time to Contact: ____________________

Primary Tax Situation:

☐ W-2 Employee ☐ Business Owner ☐ Retired

☐ Investor ☐ Other ____________

State of Residence: ____________________

4 YOUR TAX EFFICIENCY COMPASS™

YOUR SCORE	YOUR COMPASS	WHAT IT MEANS	RECOMMENDED NEXT STEP
0 – 2 YES	Efficient Path	Your tax situation appears fairly efficient, but an annual review is still recommended.	Stay proactive. Continue good tax habits and consider an annual review.
3 – 5 YES	Planning Opportunities Identified	You may have overlooked planning opportunities that could improve your tax position.	Schedule a Tax Strategy Conversation to explore potential savings.
6 – 8 YES	Action Recommended	There are likely several tax-saving strategies worth reviewing before year-end.	Take action now. Planning before year-end can make a significant difference.
9 – 14 YES	High Opportunity Zone	You are an excellent candidate for proactive tax planning.	Schedule your Tax Strategy Conversation as soon as possible.

5 NEXT STEP

Schedule a confidential Tax Strategy Conversation with Valhalla Tax & Finance LLC to review your results and uncover opportunities.

Let's build your strategy. Together.

6 WHY THIS MATTERS

Most taxpayers discover tax issues after their return has been prepared. Proactive tax planning identifies opportunities before year-end, when there is still time to act. Small decisions made today can have a meaningful impact on tomorrow's tax bill.

7 CONFIDENTIALITY NOTICE

Your responses are confidential and will only be used to provide your Tax Efficiency Score and to contact you regarding your results. We do not sell or share your information.