Small Business Tax Planning Meeting Guide

ALAJIAN GROUP INC.

ALAJIAN GROUP INC.

Hey, it's Armine!

You're here because you want to walk into your tax planning meeting prepared and make every minute count. I'm here to help you do just that!

At Alajian Group Inc., we provide accounting, consulting, tax, and business management services for individuals, startups, businesses, and the entertainment industry—with a particular focus on startups.

I've put together this guide to help you organize your 2026 numbers, anticipate changes in 2027, and identify the questions you want to discuss with your tax professional.

Grab your favorite beverage, and let's get ready for your tax planning meeting!

NOTE: This guide is for educational purposes only and is not legal, tax, or financial advice.

THE BEST PLACE TO START

What's happened in your life and business so far this year?

Your 2026 Numbers

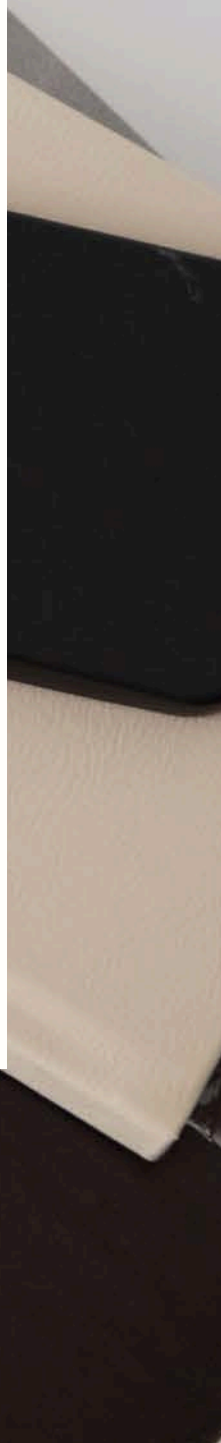
Business YTD Net Income	$ _____
Projected Remaining Net Income *(Oct. - Dec.)*	$ _____
2026 Federal Est. Tax Payments Made	$ _____
2026 State Est. Tax Payments Made	$ _____
Your YTD W-2 Wages	$ _____
Federal withholding?	$ _____
State withholding?	$ _____
Spouse's YTD W-2 Wages	$ _____
Federal withholding?	$ _____
State withholding?	$ _____
Interest + Dividends	$ _____
Capital Gains/Losses	$ _____
Rental Income	$ _____
Other Income	$ _____
Retirement Contributions Made	$ _____
Account Type?	_____

STOPPPP!

Before you go any further, we need to make sure we can actually *trust* your business numbers from the last page.

Make sure you've got:

- [ ] Your bank + credit card accounts reconciled through 9/30
- [ ] No uncategorized transactions
- [ ] Any loan balances tied out to statements
- [ ] Any payroll on your books tied out to your payroll reports



TIME TO TALK PLANNING

A few things your tax accountant needs to know to help you:

First, how do you expect your 2027 income to compare to 2026?

- ☐ Higher
- ☐ Lower
- ☐ About The Same

Second, are you anticipating any of these life changes in 2027?

- ☐ New Job
- ☐ Retirement
- ☐ Moving States
- ☐ Change in Filing Status
- ☐ Change in Dependents
- ☐ Buying/Selling Real Estate

Tax Planning Meeting Q's

01. What am I projected to owe or receive as a refund for 2026?

02. Should I adjust my remaining estimated tax payments or payroll withholding?

03. Would changing the timing of any planned income or deductible expenses make sense?

04. Are there any retirement, payroll, or other actions I should take before year-end?

05. Based on my expected 2027 changes, are there any new obligations or opportunities to be aware of?

THE BIG PICTURE

Which financial goals should your tax plan prioritize?

- [ ] Lower my business taxes
- [ ] Lower my personal taxes
- [ ] Save for retirement
- [ ] Save for higher education
- [ ] Prepare to buy/sell real estate
- [ ] Coordinate with my investment strategy
- [ ] Plan charitable giving
- [ ] More predictable cash flow
- [ ] Review my entity + owner-pay setup
- [ ] Wealth transfer or estate planning
- [ ] Plan for a liquidity event
- [ ] Prepare for a business exit

Let’s Connect!

Alajian Group Inc. provides accounting, consulting, tax, and business management services, specializing in startups and supporting individuals, businesses, and the entertainment industry.

Armine Alajian
(323) 320-4044 | info@alajiangroup.com
1800 Vine St, Los Angeles, CA 90028

WWW.ALAJIANGROUP.COM