

August 14, 2017

Contract Initiation



Date: 7-24-17  
 Business Name: ALLIANCE ENTERPRISES SSL, INC.  
 Contact Person: SUZANNE LOCKHART  
 Current Address: [REDACTED] P. Springs, GA 30127  
 Mailing Address: (If different) \_\_\_\_\_  
 Telephone: [REDACTED] Business [REDACTED] Home \_\_\_\_\_  
 Email Address: contact @ alliance tax prep @ [REDACTED]. COM

1. Business Status

Existing Business      01/01/2014 Approximate Date Started  
 New Business      \_\_\_\_\_ Projected Start Date

2. Business Organization

Legal Organization of Firm:

Sole Proprietorship      \_\_\_\_\_ Federal Employer Tax ID #  
 Partnership      \_\_\_\_\_ Georgia Employer Tax ID #  
 Limited Liability Company  
 Corporation      State: GA      Date of Incorporation: 7/2016 (approx.)

Principal Owners/Stockholders:

| Name                    | Address           | Social Security Number |
|-------------------------|-------------------|------------------------|
| <u>SUZANNE LOCKHART</u> | <u>[REDACTED]</u> | <u>[REDACTED]</u>      |
| <u>GA 30127</u>         | <u>[REDACTED]</u> | <u>[REDACTED]</u>      |

Powder Spring

**PLEASE ATTACH A 3-5 PAGE BUSINESS SYNOPSIS FOLLOWING A BUSINESS PLAN FORMAT.  
INCLUDE CURRENT FINANCIALS AND OR ONE YEAR OF PROJECTIONS.**

By signature to this Application for Admittance, applicant acknowledges that the Incubator Program Management may obtain relevant credit and background information with respect to the applicant business and/or its principals.

The undersigned applicant, declares that all information supplied above and in the business proposal are true and accurate and that I have not willfully suppressed any material fact.

Shayne Dockhart  
Applicant's Signature

9-24-17  
Date

CEO  
Applicant's Title

## Alliance Tax Preparation, Inc. Business Profile

### **Alliance Tax Preparation, Inc.**

3350 Riverwood Pkwy, Ste 1900

Atlanta, GA 30039

678-667-1149

[contact@alliancetaxprep.com](mailto:contact@alliancetaxprep.com)

alliancetaxprep.com

### EXECUTIVE SUMMARY

**Alliance Tax Preparation, Inc.** is a financial services industry licensed with the City of Powder Springs and registered with the Georgia Secretary of State. **Alliance Tax Preparation, Inc.** provides tax preparation compilation services mainly for individuals and small businesses in the local Cobb County area.

By operating a tax return preparation business we are striving to alleviate the complicated process and stress of financial accounting by providing a user friendly blueprint that will help our clients pay their taxes on a timely basis without excessive stress.

### MISSION STATEMENT

Provide the best customer service for working class families and small/medium enterprises. Provide clear paths for clients, giving them as much information, knowledge and advice to maximize their tax return dollars allowed by law. Utilizing accounting principles without the higher cost.

### WHY WE PROVIDE THIS SERVICE

Tax preparation is an important part of every business. We have found that many people and businesses are inundated with this process. That is why **Alliance Tax Preparation, Inc.** provides tax preparation services to assist our clients to stay up to date and remain current with their taxes.

### MANAGEMENT

**Alliance Tax Preparation, Inc.** has 5 years of comprehensive and authoritative knowledge and skill in the area of tax return preparation. We have gone through annual rigorous certifications so as to be certain that we are up to date on the most recent, ever changing tax laws. Being included in the public directory of tax return preparers (Annual Filing Season Program – Record of Completion) differentiates us in the market place. Annual Filing Season Program participants can represent clients whose returns they prepared and signed, before revenue agents, customer service representatives, and similar IRS employees, including the Taxpayer Advocate Service. We also maintain our PTIN (Preparer Tax Identification Number) and ERO (Electronic Return Originator) accreditations.

## **PRODUCTS AND SERVICES**

**Alliance Tax Preparation, Inc.** offers tax return preparation to citizens in Cobb County and beyond. We have the sole intention of working with individuals, small and medium businesses.

The following includes what we offer:

- \*Personal and business tax return compilation services
- \*Personal and business tax return preparation services
- \*Basic tax preparation services
- \*Full service tax preparation services
- \*Tax related financial services
- \*Other financial consulting and advisory related services

## **MARKET ANALYSIS**

Market Trend - The tax industry is a very diverse and large industry. However, the current trend seems to indicate that the individual tax payer and the smaller businesses are looking for alternative competent tax businesses that are fee competitive. **Alliance Tax Preparation, Inc.** is building a reputation to provide the high end service with the lower cost fee. Our trend is to continue to meet that goal.

Target Market – Our product and services are strategically geared for the working class families and small businesses and entrepreneurs. **Alliance Tax Preparation, Inc.** caters to the tax preparation needs of the aforementioned, as well as start-up businesses and well established companies. We are client oriented and available to assist our clients year round with their tax preparation needs.

SALES AND MARKETING STRATEGY – We have hired top notch business developers to assist us with our sales, social media and marketing. They are assisting with the development of our search engine optimization, website and social media marketing techniques.

## **COMPETITIVE ADVANTAGE**

The financial industry is one that is heavily competitive. This is why we hope to beat the local competition by being a tax preparation company that offers online services, prior year tax amendments and financial consultation. This would help us in carving out a unique market that would focus on specific clients and meet their needs.

We would also provide quality service for our clients that is consistent and improved based on our client's expectations. We will achieve this by our professionalism and continued education in this field.

## **CONCLUSION**

This business plan for **Alliance Tax Preparation, Inc.** will serve as the platform for the execution of our mission and vision in this highly specialized financial services industry. We are under the opinion that this is an every changing and evolving industry and we are subject to change based on this awareness.