



# Our GAP Plan Strategy

## The Benefits of a GAP Plan

A GAP Plan provides leadership with a cohesive strategy broken into simple elements to help them remain focused on the critical success factors of their organization. It is our process, developed in collaboration with you, to help you move closer to achieving your goals, while working towards the resolution of barriers that impede progress.

## The GAP Plan Steps

### Step 1 | Establishing Critical Goals

We identify the 3 to 5 items you think are most important to your organization. These items do not need to be accounting or tax issues. They need to be the main components of your vision.

### Step 2 | Identifying The Key Goal

Then, we ask if you could only choose one of those items, which is the most important to you. This enables us to work in collaboration with you, so we do not lose sight of the main objective.

### Step 3 | Problem Resolution

Next, we uncover the obstacles slowing you down or preventing you from achieving the 3 to 5 items. Understanding your pain points allows us to work toward eliminating or minimizing their impact.

### Step 4 | Narrowing The GAP

Finally, we develop your GAP Plan, which we follow to help narrow the gap from where you are today to where you want to go.

## The Next Step

Let us conduct a GAP analysis customized for your organization. Contact us at **301.272.6000**

## Additional GAP Plan Components

**Identify Tax Drivers** | These are credits or incentives unique to your organization that may defer tax liability, provide incentives to purchase assets, hire employees or deliver other benefits.

**Develop a Tax Plan** | This is a comprehensive strategy to integrate your business and personal tax decisions. It assesses long-term tax planning, evaluates estate and trust issues, philanthropic or family gifting strategies and aids in the eventual exit or succession of your company.

## Frequent Communications

We stay in contact with you throughout the year. Some communications may be as simple as a phone call, while others may be a lunch or a formal boardroom review. We find it is vital to keep lines of communications open, so we can help you measure the tax and financial impact of potential decisions you are facing. Change is constant and our goal is to help you proactively manage the moving parts of your business.

## Why Our Firm?

We understand where to focus and how to keep our clients spending their energy on matters that make an impact. The core deliverable from your CPA should not be a tax return or an audit report. The deliverable should be a relationship that helps leadership eliminate pain points and optimize results.