
BUDGET & SUPPLY LIST FOR STARTUP TAXPRENEURS



WRITTEN BY
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**CONGRATULATIONS ON YOUR DECISION TO
OPEN YOUR TAX FIRM. THIS DOCUMENT
WILL PROVIDE YOU WITH A SAMPLE BUDGET
THAT WILL HELP YOU PREPARE FOR THE
UPCOMING TAX SEASON. IN ADDITION, YOU
WILL RECEIVE A SUPPLY LIST AS WELL.**

**KEEP IN MIND THAT MOST TAX BUSINESS
OWNERS WILL GO AT LEAST 3 MONTHS
WITHOUT FUNDING IF YOU WORK WITH
CLIENTS WHO DO NOT PAY THEIR FEES OUT
OF POCKET. THIS SAMPLE BUDGET IS
CREATED FOR TAXPRENEURS WHO SERVE
MAJORITY OF CLIENTS WHO RECEIVE BANK
PRODUCTS**


SAMPLE BUDGET FOR STARTUP TAXPRENEURS



STARTUP BUDGET

• *Rent	\$700.00
• *Lights	\$200.00
• *Water	\$100.00
• *Gas	\$150.00
• Wifi and office phone	\$120.00
• Marketing - postcards, website, business cards, social media ads, giveaways	\$1500.00
• Supplies	\$500.00
• Furniture	\$1,500.00
• *Deposits for Utilities	\$1,000 .00
• Business Entity Setup	\$400.00
• Business License	\$100.00
• Tax Genie Software	\$399.00

*Your budget can be reduce if you run a virtual office with any item that has a * beside it.*

A woman with short dark hair and yellow-rimmed glasses is looking down at a tablet computer. She is wearing a bright red blazer over a white top, tan trousers, and brown pointed-toe pumps. She is standing in front of a light-colored wall with a small square vent. A semi-transparent green rectangular box is overlaid on the left side of the image, containing white text.

**YOUR NUMBERS MAY
VARY BASED UPON
LOCATION AND
WHEN/WHERE YOU
PURCHASE YOUR ITEMS.**

SUPPLY LIST



STARTUP SUPPLY LIST

Copy paper
Black ink pens
Highlighters
Staples and staple removers
Tape
Gem clips
Binder clips
Manilla folders
Hanging folders

File cabinet with lock
Laser printer
Ink cartridge
Safe
Desktop/Laptop/IPAD with antivirus software
Snacks (IP)
Bathroom supplies (IP)
Cleaning Supplies (IP)
Broom (IP)
Vacuum (IP)
Coloring books and crayons (IP)
TV with roku or Netflix (IP)

ADDITIONAL ITEMS NEEDED

Business line (Side Line, Google, Grass hopper or add a second line to your cell phone)
Business fax (Ring Central or Go Daddy)
Marketing material - business cards, website, post cards
Professional Tax Software



**THE BEST TIME TO
PURCHASE SUPPLIES IS
DURING SCHOOL SUPPLY
SEASON.**

**THE BEST TIME TO
PURCHASE EQUIPMENT &
FURNITURE IS THE DAY
AFTER THANKSGIVING.**



NOW THAT
YOU HAVE
GONE
THROUGH THE
DOCUMENTS,
YOU HAVE
SOMETHING TO
REFERENCE. IF
YOU HAVE ANY
QUESTIONS,
FEEL FREE TO
EMAIL ME

Dee Edwards





**NEED TAX
SOFTWARE TO HELP
BUILD YOUR SIX
FIGURE TAX FIRM?**



LET US GROW WITH YOU

Interview or form mode	No network required. Only internet
Paperless solutions	Work from anywhere
Signature pad or touch screen compatibility	Work from any smart device or computer
Manage Multiple Office	Setup tax preparers
Back office reporting	50 State E-filing
Incentives	Powered by TaxSlayer

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Dee Edwards is a Taxpreneur, Continuing Education Provider with the IRS & Startup Business Coach who assist tax business owners **START, GROW & BUILD** six-figure tax firms. Her services include providing document solutions, professional software, and training to tax professionals & owners nationwide.