

Vision Worksheet

Client Name: Make Taxes Fair

Date: March 17th 2025

Step 1: Brainstorm

Ask yourself/discuss with your team the following questions.

What does an ideal world look like to you and your brand?

People don't fear what they don't understand because they have help and a source of answers. Business owners can focus on growing their business instead of being burdened (financially and emotionally) by taxes.

The world operates on systems.

Adopting James Clear "Atomic Habits" we don't rise to the level of our goals, we fall to the level of our systems.

For our clients, we play in the sandbox of finances, specifically taxes, but if we can find a way for our clients to simplify their lives and have systematic and consistent approaches to the problem of finances and taxes, then we will have done some good in the world.

This is a major stressor for the vast majority of business owners.

Hitting the "easy button" is key to help people adopt and change.

What is one wrong you would like to see righted?

Confusion causes stress...

Stress causes waste and burnout.

What is one idea you wish everyone understood?

The value of their time and how to capture leverage on their time to amplify their efforts.



Step 2: Define Your Vision

Our Vision:

"At Make Taxes Fair, we envision a future where every American business owner has the knowledge, confidence, and strategies to legally minimize taxes, maximize profits, and build generational wealth."

~~By transforming tax complexity into clarity and control, we empower entrepreneurs to reclaim their financial freedom and reinvest in their dreams. Through education, ethical tax systems, and our proven CLEAR EDGE Framework, we are redefining the way businesses approach taxes—forever."~~

Mission Statement:

"Make Taxes Fair exists to help American business owners take control of their taxes, legally minimize their tax burdens, and protect their profits. Through ethical, proactive strategies and our CLEAR EDGE Framework, we simplify complex tax laws, eliminate fear, and empower entrepreneurs to build long-term wealth with confidence. Our mission is to ensure that no business owner overpays the government when they could be reinvesting in their growth, their employees, and their future."