



Illion Tax & Accounting

Business Plan — Fiscal Year 2024–2029

ENTITY TYPE: S-Corp / LLC | INDUSTRY: Professional Services, NAICS 541213

EXECUTIVE SUMMARY

Illion Tax & Accounting is a technology-forward professional services firm specializing in comprehensive tax preparation, strategic tax planning, and accounting solutions for small-to-medium businesses and high-net-worth individuals. Founded on the principle that every client deserves enterprise-level financial expertise at accessible pricing, Illion combines deep regulatory knowledge with modern cloud-based workflows to deliver measurable outcomes — not just compliance.

MISSION & VALUE PROPOSITION

OUR MISSION

To empower business owners with proactive financial strategies that maximize wealth, minimize tax burden, and fuel long-term growth.

CORE VALUES

- Proactive — we anticipate, not react
- Transparent — no hidden fees
- Technology-first — efficient workflows
- Client-centered — you own your data

SERVICE PORTFOLIO

Tax Preparation & Filing

Individual 1040, business returns (S-Corp, Partnership, C-Corp), multi-

\$1,200 – \$8,500

Strategic Tax Planning

Year-round planning, entity optimization, tax deferral strategies,

\$3,500 – \$18,000/yr

Bookkeeping & Accounting

Monthly reconciliation, financial statements, AP/AR management,

\$450 – \$2,800/mo

Payroll Administration

Full-service payroll processing, multi-state compliance, W-2/1099

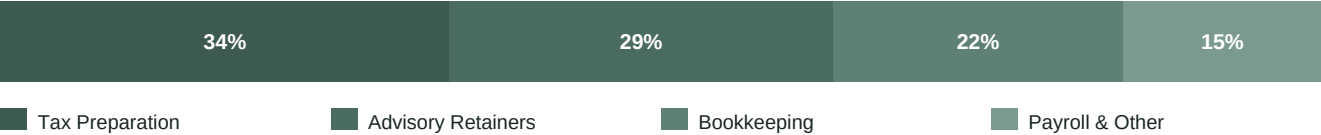
\$200 – \$1,200/mo



PRIMARY GROWTH DRIVERS

01	Referral Network Expansion \$0 CAC	\$127K projected new ARR Year 1 Target
02	Digital Lead Generation SEO + Ads	\$89K projected new ARR Year 1 Target
03	Advisory Service Upsell Existing Clients	\$156K projected new ARR Year 1 Target
04	Strategic Partnerships B2B Channel	\$74K projected new ARR Year 1 Target

PROJECTED REVENUE MIX — YEAR 3



5-YEAR FINANCIAL PROJECTIONS

Metric	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Revenue	\$187,000	\$312,000	\$498,000	\$724,000	\$1,050,000
Operating Expenses	\$142,000	\$218,000	\$331,000	\$463,000	\$641,000
EBITDA	\$45,000	\$94,000	\$167,000	\$261,000	\$409,000
EBITDA Margin	24.1%	30.1%	33.5%	36.0%	39.0%
Active Clients (EOY)	48	89	152	224	318
Avg. Revenue/Client	\$3,896	\$3,506	\$3,276	\$3,232	\$3,302

KEY MILESTONES

Q1 2025 Launch referral program; hire 1 part-time bookkeeper; CRM implementation

Q3 2025 Reach 75 active clients; launch monthly tax planning webinar series

Q1 2026 Add payroll service line; hire 2nd CPA; move to dedicated office space

Q4 2026 Break \$500K ARR; introduce fractional CFO service tier

2028 Evaluate acquisition of 1–2 retiring CPA client books; \$1M+ ARR target

Ready to build your custom business plan?

Our team at Illion Tax & Accounting prepares USCIS-compliant and investor-ready plans tailored to your business.