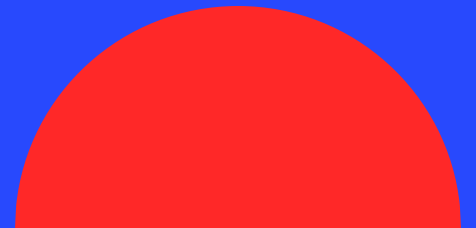
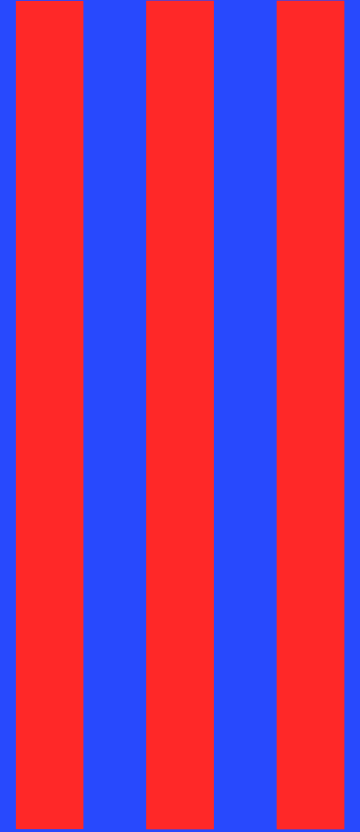


# **Commerce Department Small Business Tax Prep Program Briefing**



# Agenda

Introductions

Context

Dates

Program Structure

Compensation

Proposal Format

Q&A



# Introductions

Liam Kelly Fleming  
**Sr. Director Small Business Resources**


Destiny Gadson  
**Director, CDC Programs**

Ting Wang  
**Director, Business Advocacy**






# **BIRT Changes & Business Resources**

- **BIRT Update:** \$100K exemption removed; City investing **\$38M** in small business programs.
  - **Tax Prep Focus:** Goal to serve **5,000 businesses** with local, state & federal tax prep in FY26.
  - **Opportunity:** Seeking qualified **Philadelphia-based** tax prep firms to partner.
- 



# Important Dates

- Questions due: **5pm August 29<sup>th</sup>**
  - Answers posted to PIDC website by **5pm, September 2<sup>nd</sup>**
  - RFP submission deadline- **5pm September 23<sup>rd</sup>, 2025**
  - Proposed Contract Start- **November 1, 2025**
- 



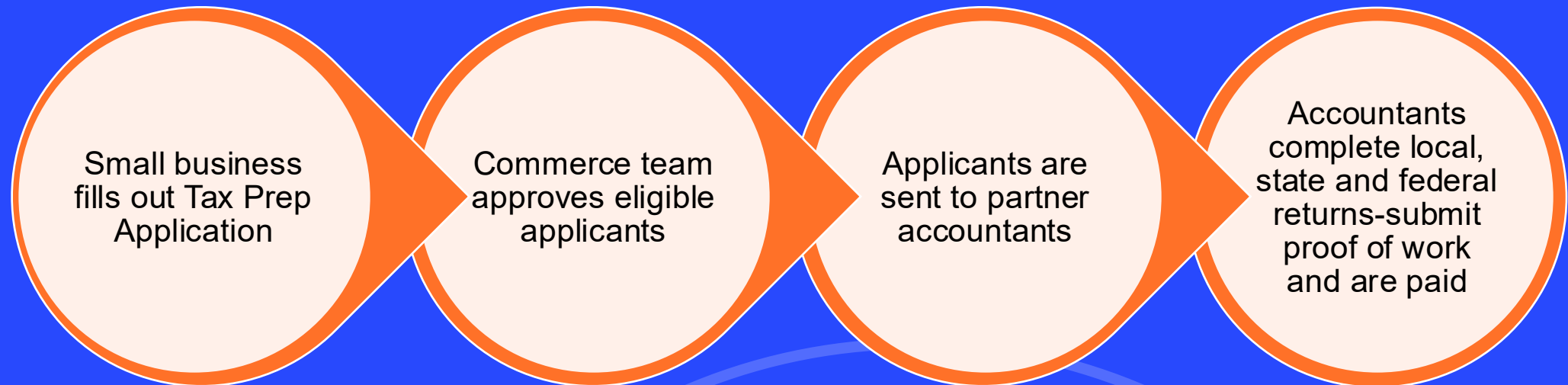
# Requirements

- Have a physical location or satellite location in Philadelphia-this could be temporary for during tax season, the goal is for clients who need in person service to have access to their tax preparer
- CPA, EA encouraged to apply, minimum credentials is 3 years of experience as a business tax preparer
- Ability to provide at least 3 references who can attest to your work as a business tax preparer
- Compliance with all city regulations, laws and taxes required to enter a contract

# Program Structure

Commerce will handle **outreach, applications, and vetting.**

**Approved tax firms** will receive business referrals, mostly random, with exceptions for language or location needs.



# Budget & Compensation

- Uniform fixed compensation by service
- Avg. **\$1,200** per business owner
- Extra services (e.g. **bookkeeping setup, prior amendments**) require Commerce approval

Service	Type	Service	Payment upon proof of filing
Tax Return Prep & E-Filing	LLC Disregard Entity/Sole Proprietor	Form 1040-Individual Income Tax Schedule C, PA & City	\$500
	Partnership	Form 1065 & PA, City Tax Return	\$600
	Corporation	Form 1120 & PA, City Tax Return	\$600
	S-Corporation	Form 1120S & PA, City Tax Return	\$600





# Proposal Format

Applications come in via Formstack: [https://phila-uyims.formstack.com/forms/rfp\\_tax](https://phila-uyims.formstack.com/forms/rfp_tax)

The form includes questions with the ability to answer in the form as well as places to attach supporting documentation

Please reach out to [Liam.KellyFleming@phila.gov](mailto:Liam.KellyFleming@phila.gov) with any issues regarding the application form





# Thank you

Liam Kelly Fleming

**Sr. Director Small Business Resources**

Email: [Liam.kellyfleming@phila.gov](mailto:Liam.kellyfleming@phila.gov)

[Pidcphila.org/Contracts](http://Pidcphila.org/Contracts)

