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**Top Goals:**

The top goals that William Thomas and Associates are to: Increase number of tax returns processed during tax season, increase clients who are interested in retirement, estate planning and investment planning, and to increase engagement with their clients via a "Tax Update" newsletter.

**List of the Content:**

In order to showcase all that William Thomas and Associates has to offer, the website should include a navigation bar with the following information that will drop down to further specific categories.

**Services**

- personal accounting
- small business accounting
- estate planning
- retirement planning
- investment planning
- schedule an appointment

**News and Events**

- tax update news letter
- a blog?

**Ask Our Team**

- bios
- contact
- FAQ

**About Us**

- our story
- location
- client testimonials
- our values

We would also like to add a secondary navigation where you can sign in, sign up for the tax update news letter, and schedule an appointment so that it can be easily accessible for returning users.

**List of types of Templates/Layouts:**

The types of templates and layouts we will need are:

- home
- contact
- service
- calendar
- sign up

**Common Themes:**

Generally the sites were all the same, with a hero image on the home page and content that was easily understood on the interior pages. The common themes we found across three of our competitors sites were that they all had a navigation bar with drop down menus, along with having a footer, search bar, and sign in button at the top of the page. They also had professional advice, consulting abilities, and informational tones. All three sites were organized and easy to navigate with visual imagery instead of using maximum wordage on the page. Their typography was easily read and they all have inviting color palette. The only site that seemed different was the Walthall site. It was harder to navigate due to the drop down menu and their website code was broken on their interior pages, making their calendar and footer not readable.