

# TAX SUPPORT PACKAGES

## individual tax services

	PREMIUM	FULL SUPPORT	ESSENTIALS
24/7 access to all tax returns and supporting documents in our secure online vault	✓	✓	✓
25-minute strategy meeting to review your tax return	✓	✓	✓
Estimated payment vouchers to eliminate tax penalties	✓	✓	✓
Preparation and electronic filing of your current tax return to get your refund faster	✓	✓	✓
Invitations to our monthly financial wellness workshops	✓	✓	✓
Professional insurance review to maximize savings and coverage	✓	✓	✓
Included in IRS Response Program	✓	✓	
Real time tax projection: a mid-year 25-minute web meeting with a tax pro designed to give you answers to your tax liability questions so you can plan ahead!	✓	✓	
Dedicated tax professional assigned to your file	✓	✓	
Unlimited email support: Tax question? We're here when you need us!	✓	✓	
Personal or business financial coaching to set goals with meaningful metrics and have an accountability partner.	✓		
Three 25-minute consultations (June, Sept & Dec) to reduce tax liability, understand your options, increase profits, meet goals, etc!	✓		

### A LA CARTE SERVICES

<b>25-min strategy session</b>	\$125
<b>Email support</b>	\$250/hr
<b>Tax consultation</b>	\$250/hr (1 hr minimum)

SAVE 25%

SAVE 25%

PRICE BASED  
ON RETURN  
COMPLEXITY



**Schedule a  
consultation today!**

# BUSINESS PACKAGES

• • • • **strategic accounting** • • • •

## ESSENTIALS

**Improve Operations**  
starting at \$500/mo

- ✓ Monthly Accounting
- ✓ Initial Strategy Session
- ✓ Year-End Tax Planning
- ✓ Assigned Accountant
- ✓ Support via Phone, Email, and Meetings

**POPULAR**

## FULL SUPPORT

**Empower Growth**  
starting at \$750/mo

- Everything from ESSENTIALS, **plus** Quarterly Advisory Services:
- ✓ Custom Reporting
  - ✓ Business Tax Return
  - ✓ Risk Assessment
  - ✓ Retirement Readiness
  - ✓ Annual Strategic Financial Session

## PREMIUM

**Scale Successfully**  
starting at \$1,500/mo

- Everything from FULL SUPPORT, **plus** Monthly Advisory Services:
- ✓ Cash Flow Analysis
  - ✓ Financial Goal Tracking
  - ✓ Forecasting
  - ✓ Annual Budget Development

A one-time onboarding and strategy session investment will be added to all packages, with a minimum investment of \$1,599, based on business complexity and relationship.

• • • **available a la carte options** • • •

**Individual Tax Planning**

**Payroll Processing**

**Group Benefits**

**Group 401(K) Plans**

### COMMERCIAL INSURANCE

#### Risk Assessment

What risk exposures does your business have?

#### Asset Protection

What assets are you protecting? Do you have enough coverage?

#### Access to Dozens of Carriers

We'll find options to fit your unique needs.

### FINANCIAL PLANNING

#### Financial Analysis

Strategic financial analysis and planning to help you make informed decisions.

#### Investment Management

Asset management to help you meet your goals.

#### Tax Planning

Optimize your taxes and reduce your liability.

Not sure what service your business needs? Schedule a consultation today!