

Rose Gold Maintenance Package



THE "ROSE GOLD" MAINTENANCE PACKAGE IS DESIGNED FOR GROWING BUSINESSES STARTING TO LOOK FOR HELP WITH THEIR BUSINESS BOOKS AND RECORDS. YOU GET THESE ONGOING SERVICES:

- **Business Tax Preparation.** We'll prepare your business tax return (proprietorship, partnership, or corporation). Additional entities may incur an additional charge.
 - Tax return preparation is included with our Tax Maintenance package **after 12 months** of being onboarded in our program. Tax return preparation services will incur a separate fee until the one-year mark is reached.
- **Personal Tax Preparation.** We'll prepare your federal, state, and local personal tax returns.
 - Tax return preparation is included with our Tax Maintenance package **after 12 months** of being onboarded in our program. Tax return preparation services will incur a separate fee until the one-year mark is reached.
- **Phone Consultations.** You can schedule **six** 15-minute phone consultations, at your convenience throughout the year, to address breaking issues and opportunities throughout the year.
- **Email Consultations.** You can email up to **six** specific questions, at your convenience, or written responses.
- **Tax Alerts.** You'll get our weekly email alerts and monthly newsletter with timely tips for making the most of your money.
- **Due Date Monitoring.** You'll get our Due Date Monitoring service to ensure you never miss an important tax deadline again.
- **Year-End Sit-Down.** You'll get a year-end "sit down" meeting to review your tax picture. We'll update you with everything you need to know about deductions you can take, anticipating tax roadblocks and opportunities, avoiding IRS audits, and maintaining your personal tax plan based on your changing personal circumstances.
- **One-on-one Financial Review.** Your year-end sit-down also includes a comprehensive financial statement review. Together, we'll walk step-by-step through your financial statements. We'll show you what the numbers mean, and how you can use them to make smarter business decisions.
- **Open Questions.** As with the Silver package, your year-end sit-down includes an open Q&A period.
- **Fall Tax Review.** We'll develop a detailed year-end tax projection, along with a detailed tax-strategy plan to minimize your tax liability, and a calculation of estimated tax payment so you don't get caught short on April 15.
- **Quarterly Profit Assessment.** Quarterly Profit Reviews Virtual Meeting. These are evaluations of your profit performance and percentage adjustments if necessary. Signing the Engagement Letter you are in agreement to set up quarterly meetings to ensure that we stay aligned with your financial aspirations and provide the best possible support.
- **Monthly Q&A Session.** As part of our tax maintenance program, we now offer monthly online Q&A sessions with Agent Rae. These sessions are designed to address a variety of topics and answer your questions. Participation is optional and included as an enhanced service within your package. The sessions are held on the 2nd Thursday of each month from 3:00 PM to 5:00 PM. Teams meeting link will be sent to you through email.

YOUR INVESTMENT IN THE "ROSE GOLD" MAINTENANCE PACKAGE IS JUST **\$675/MONTH**, BILLED DIRECTLY TO YOUR CREDIT CARD. THAT'S **LESS THAN \$23/DAY** FOR PROACTIVE TAX PLANNING AND PREPARATION PLUS ONGOING ACCOUNTING AND BOOKKEEPING OVERSIGHT. IT'S HARD TO FIND A DECENT LUNCH FOR THAT LOW A PRICE. IF YOUR GROWING YOUR BUSINESS, IT SHOULD BE AN EASY CALL