



TAX MAINTENANCE PACKAGE



	GOLD	ROSE GOLD	SILVER
Tax Plan	COMPLEX	SIMPLE	NONE
Business Tax Preparation	✓	✓	✓
Personal Tax Preparation	✓	✓	✓
Phone Consultations	6 per year	6 per year	3 per year
Email Consultations	UNLIMITED	6 per year	3 per year
Tax Alerts	✓	✓	✓
Due Date Monitoring	✓	✓	✓
Year-End Virtual Tax Review	✓	✓	✓
Open Question	✓	✓	✓
One-on-One Financial Review	QUARTERLY	QUARTERLY	QUARTERLY
Financial Performance Review	QUARTERLY		
Quarterly Profit Assessment	VIRTUAL MEETING	VIRTUAL MEETING	VIRTUAL MEETING

*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.*

Gold Maintenance Package

THE "GOLD" MAINTENANCE PACKAGE IS OUR MOST COMPREHENSIVE SERVICE, DESIGNED FOR MORE MATURE ORGANIZATIONS LOOKING FOR ONGOING HELP WITH BUSINESS BOOKS AND RECORDS. YOU'LL ENJOY 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.
- **6 Phone Consultations.** You can schedule **six** phone consultations at your convenience throughout the year, to address breaking issues and opportunities throughout the year.
- **Unlimited Email Consultations.** You can email an **unlimited** number of questions at your convenience for written responses.
- **Tax Alerts.** You'll get our monthly newsletter email alerts 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.
- **Quarterly Virtual Meetings.** You'll get quarterly virtual meetings 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.
 - **Quarterly One-on-One Financial Reviews.** Your quarterly virtual meetings also include 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.** Your quarterly virtual review includes an open Q&A periods.
 - **Quarterly Financial Performance Reviews.** Finally, the Gold Package Includes Quarterly Financial Performance Reviews. These are plain-English translations of your business financial statement, where we identify your individual strengths and weaknesses. The Review comes with a detailed comparison to your competitors.
 - **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.
- **Fall Tax Planning Review.** We'll develop a detailed year-end tax projection, along with a detailed tax-strategy plan to minimize your tax liability, & a calculation of estimated tax payments so you don't get caught short on April 15.

YOUR INVESTMENT IN THE "GOLD" MAINTENANCE PACKAGE IS JUST **\$1250/MONTH**, BILLED DIRECTLY TO YOUR CREDIT CARD. THAT'S **LESS THAN \$42/DAY** FOR OUR MOST COMPLETE SUITE OF SERVICES. YOU'LL PAY MORE THAN THAT JUST TO DETAIL YOUR CAR. IF YOUR TAX IS STARTING TO HURT, THIS SHOULD BE YOUR FIRST REMEDY!

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** 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 monthly newsletter email alerts 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 Virtual Meeting.** You'll get a year-end virtual 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 virtual meetings 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.** Your year-end virtual meetings include 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.

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

Silver Maintenance Package

THE "SILVER" MAINTENANCE PACKAGE IS DESIGNED FOR NEW BUSINESS OWNERS AND INVESTORS WHO WANT A STRONG TAX FOUNDATION. YOU GET THESE ONGOING SERVICES:



- **Business Tax Preparation.** We'll prepare your primary business entity 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 **three** phone consultations, at your convenience throughout the year, to address breaking issues and opportunities throughout the year.
- **Email Consultations.** You can email up to **three** specific questions, at your convenience, for written responses.
- **Tax Alerts.** You'll get our monthly newsletter email alerts 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 Virtual Meeting.** You'll get a year-end virtual 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.
- **Open Questions.** Finally, your year-end virtual meeting includes an open Q&A period. This is your chance to ask us any questions about
 - Financing
 - Business Valuation
 - Insurance Needs
 - Lease/Buy Analysis
 - Business Structure (C-Corp, S-Corp, LLC, Partnership, Sole Prop)
 - Personal Financial Planning
 - Retirement Planning
 - Estate Planning
- **Quarterly Assessment.** Quarterly Profit Reviews Virtual Meeting. These are evaluations of your profit performance and percentage adjustments if necessary.

You'll take advantage of ProActive Tax Strategies that most accountants miss to minimize your taxes. (This alone will pay for our service!) You'll sleep well knowing we're doing everything to prevent audits. And you'll have access to a trusted business advisor to answer pressing financial questions.

YOUR INVESTMENT IN THE "SILVER" MAINTENANCE PACKAGE IS JUST **\$400/MONTH**, BILLED DIRECTLY TO YOUR CREDIT CARD. THAT'S **LESS THAN \$14/DAY** FOR PROACTIVE TAX PLANNING AND PREPARATION THAT CAN SAVE YOU THOUSANDS, YEAR AFTER YEAR. YOU CAN PAY THAT MUCH FOR YOUR MORNING BREAKFAST AND COFFEE. IF YOU'RE SERIOUS ABOUT MINIMIZING YOUR TAXES, THAT SHOULD BE AN EASY DECISION.