



Six Core Packages + Easy Add-Ons

	Personal Starter	Personal Tax Saver	Personal Growth	Business Starter	Business Tax Saver	Business Growth
	Reporting-Only	Tax + One Tax Project	Tax + Advanced Tax Plan	Reporting-Only	Tax + One Tax Project	Tax + Advanced Tax Plan
	From \$49/mo	From \$149/mo	From \$249/mo	From \$129/mo	From \$449/mo	From \$949/mo
What's Included:						
1 Expert Personal Tax Prep	✓	✓	✓	✓	✓	✓
2 Expert Business Tax Prep	✗	✗	✗	✓	✓	✓
3 Secure Digital Portal	✓	✓	✓	✓	✓	✓
4 IRS/State Notice Support	✓	✓	✓	✓	✓	✓
5 Quick Question Subscription	✗	✓	✓	✗	✓	✓
6 Annual Tax Savings Plan (Tax Tune Up)	✗	✓	✓	✗	✓	✓
7 Year-Round Advanced Tax Strategies	✗	✗	✓	✗	✓	✓
8 Strategic Money Analysis Networth Analysis, Cashflow Analysis, Threats Analysis	✗	✗	✓	✗	✓	✓
9 Business Growth Support Profit Planning & Business Financing Strategies, Reasonable Compensation Analysis	✗	✗	✗	✗	✗	✓
Easy Add Ons	Price Details					
1 Business Startup Package	From \$1,500	One Time	State Entity Formation & EIN Filing S-Corp Election with IRS Reasonable Compensation Analysis			
2 Accounting Need Analysis	From \$500	One Time	Upfront fee to analyze your accounting needs and define a quote for on-going services.			
3 Basic - Automated Accounting	From \$350	Per Month	Based on Complexity			
4 Standard - Automated Accounting	From \$750	Per Month	Based on Complexity			
5 Advanced - Automated Accounting	From \$1000	Per Month	Based on Complexity			
6 Individual Setup & Onboarding	From \$150	One Time	* Required for new individual clients.			
7 Business Setup & Onboarding	From \$750	One Time	*Required for new business clients. Based on Complexity			
8 S-Corp Automated Payroll	From \$75	Per Month	Base Fee + \$150 Onboarding Fee (owner only S Corps)			
9 Tax Tune-Up	From \$650	One Time				
10 Tax Tune-Up Implementation	From \$950	One Time	Based on Complexity			
11 Advisor Consultation	From \$250	One Time	For Personal or Business			
12 "Quick Question" Subscription	From \$65	Per Month	For Personal or Business			
13 IRS Monitoring	From \$29	Per Month				
14 Sales Tax Management	From \$75	Per Month	Based on Complexity			
15 Non-Profit Tax Filing	From \$950	One Time	Based on Complexity			
16 Estate & Trust Tax Filing	From \$750	One Time	Based on Complexity			
17 S-Corp Add Kids on Payroll	From \$75	One Time	Set up fee only			
Tax Estimates						
Cost Segregation Study						