2025 Elite Package Pricing

	Support Level One	*Support Level Two*	*Support Level Three*
General Features			
Free postage on all mailings to you from me	N/A	N/A	Included
Monthly payment plan	N/A	N/A	Included
Payment via auto pay	N/A	N/A	Included
Priority service	N/A	N/A	Priority Over Lower Packages/Levels
Year Around Availability	Included	Included	Included
Premium Income Tax Services			
Strategy meeting prior to return preparation	N/A	Included	Included
Highly audit resistant federal and state individual tax returns	Included	Included	Included
Prompt amendments when required (obviously, this is free if we're at fault)	$865 Additional	$650 Additional	Included
Individual income tax credit reporting	Included	Included	Included
Traditional brokerage account reporting	Included	Included	Included
Schedules K-1 reporting (standard)	Included	Included	Included
Schedules K-1 reporting (complex)	Up to Three Included	Up to Three Included	Up to Three Included
Rental property reporting	Up to Three Included	Up to Three Included	Up to Three Included
Sole-proprietorship reporting	40% Discounted Rate From Published "Support Level One" Business	50% Discounted Rate From Published "Support Level One" Business	60% Discounted Rate From Published "Support Level One" Business
Separate state reporting in addition to the home state	$460 Per State Additional	$400 Per State Additional	$350 Per State Additional
Foreign disclosure reporting	$660 Additional	$575 Additional	$500 Additional
Separate dependent child return	$410 Additional Per Child Return	$355 Additional Per Child Return	$310 Additional Per Child Return
Audit defense and support allowing you to focus on your life and us to focus on your IRS or state audit	N/A	$325 Additional	Included
Empowering Advisory Services			
Creative and effective strategy meetings between you and us designed to support your tax, financial, accounting or general business needs	N/A	$310 Per Hour	Included
Forward-looking tax projections and comparative analysis	N/A	$2,300 Additional for One Comprehensive Plan	$2,000 Additional for One Comprehensive Plan
Powerful ad hoc advisory services designed and executed in partnership with you and your team	N/A	$310 Per Hour	$285 Per Hour
Tax related questions designed to help you better understand your overall tax position.	N/A	Up to Three Per Year	Unlimited
Assessment of your financial position by our friends at Horizon Financial Services, LLC	Available for Free Upon Request	Available for Free Upon Request	Available for Free Upon Request

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Deliverable Items			
One professional and durable bound paper copy of your tax returns	N/A	Included	Included
PDF digital copy of your tax returns	Included	Included	Included
PDF digital copy of your primary source documents	N/A	Included	Included
Recorded video review of your completed return	N/A	Included	Included
Live review of your completed return	N/A	N/A	Included
Personal compiled financial statement preparation (per issued statement)	N/A	N/A	Priced Separately
Price (Not Including Add-Ons)	***$2,485 Per year***	***$3,200 Per year***	***$395 Per Month***

This package is our most comprehensive package. It is best suited for trailblazers who demand a lot from themselves, and who fully anticipate harvesting the rewards of astute decision-making and hard work. Tailored for individuals with diverse and ambitious pursuits, this package places a strong emphasis on advisory support, recognizing the importance of navigating complex topics such as estate planning, tax minimization, and business continuity.

A good example would be a joint return with two kids in which one spouse is employed and receives Form W-2 reporting their wages earned and works as a corporate board member on the side. The other spouse may be fully engaged in managing a successful business, flipping real estate, managing commercial real estate holdings, diverse partnership activities with others, and any number of other activities. Often, they are engaged in more than one of these varied activities simultaneously. They typically receive several complex Schedules K-1 from partnerships or S-corporations of which they are members. They may also have tax reporting requirements in multiple states, require disclosure of foreign activities, and have multiple brokerage accounts reporting traditional investments. This situation also allows for itemized deduction reporting, individual and general business tax credits, and a few other standard items of reporting that can vary between clients.