

2025 Business Standard+ Package Pricing

Up to Around \$3MM in Revenue

	Support Level One	Support Level Two	Support Level Three
<i>General Features</i>			
Free postage on all mailings to you from me	N/A	N/A	Included
Monthly payment plan	Included	Included	Included
Payment via auto pay	Included	Included	Included
Priority service	N/A	N/A	Priority Over Lower Packages/Levels
<i>Premium Income Tax Services</i>			
Strategy meeting prior to return preparation	N/A	N/A	Included
Highly audit resistant federal and state tax returns for S-Corps, C-Corps, and Partnerships	Included	Included	Included
Prompt amendments when required (obviously, this is free if we're at fault)	\$1,290 Additional Per Filing	\$1,030 Additional Per Filing	Included
Separate state reporting in addition to the home state (per state income tax filing)	N/A	\$55 Additional Per Month	\$50 Additional Per Month
Separate franchise tax reporting if required (per taxing authority)	N/A	\$55 Additional Per Month	\$50 Additional Per Month
Special allocations of income and losses (generally an advanced feature of Partnership)	Priced Separately	Priced Separately	Priced Separately
General business income tax credits reporting	N/A	Included	Included
Consolidated tax reporting (only required if additional tax filings are necessary)	N/A	\$130 Additional Per Month	\$105 Additional Per Month
Audit defense and support allowing you to focus on your business and us to focus on your IRS or state audit	N/A	\$30 Additional Per Month	Included
<i>Other Premium Tax Services</i>			
Sales tax payment and reporting (per state)	\$575 Additional Per Month	\$550 Additional Per Month	\$500 Additional Per Month
Business personal property tax reporting (per taxing authority)	\$40 Additional Per Month	\$40 Additional Per Month	Included

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<i>Outstanding Accounting Services</i>			
Annual prepared financial statements on a tax basis w/o note disclosure (simplest form of CPA prepared financial statements)	\$200 Additional Per Month	\$190 Additional Per Month	\$170 Additional Per Month
Compiled financial statements on a tax basis w/o note disclosure (formal CPA prepared financial statements accompanied by a report)	\$235 Additional Per Month	\$225 Additional Per Month	\$205 Additional Per Month
Audited or reviewed financial statement preparation assistance and coordination (per issued statement)	Priced Separately	Priced Separately	Priced Separately
Annual closing of the books (tidy-up)	Included	Included	Included
Annual closing of the books (more than just a tidy-up)	\$80 Additional Per Month	\$80 Additional Per Month	\$70 Additional Per Month
Setup and customization of your accounting system (QuickBooks Online or QuickBooks Desktop)	\$1,150 One-time Setup	\$1,100 One-time Setup	\$1,000 One-time Setup
Detailed and accurate annual bookkeeping for preparation of the income tax returns	\$165 Additional Per Month	\$155 Additional Per Month	\$140 Additional Per Month
Timely, accurate and informative quarterly bookkeeping for use in tax return preparation and business management	\$630 Additional Per Month	\$500 Additional Per Month	\$455 Additional Per Month
Highly informative, effective and valuable monthly bookkeeping for use in all aspects of running your business and maximizing your return on investment	\$975 Additional Per Month	\$935 Additional Per Month	\$850 Additional Per Month
Fractional CFO services custom designed to meet your day-to-day accounting and finance needs	Priced Separately	Priced Separately	Priced Separately
Unlimited as needed professional bookkeeping support for you and your staff	\$195 Additional Per Month	\$185 Additional Per Month	\$170 Additional Per Month
<i>Best in Class Payroll Services</i>			
Setup and customization of your payroll processing system (QuickBooks Online or QuickBooks Desktop)	\$635 One-time Setup	\$605 One-time Setup	\$550 One-time Setup
Live weekly turn-key payroll processing, tax payment, and tax return filings	\$1,225 Additional Per Month (Up to Twelve Employees)	\$1,175 Additional Per Month (Up to Twelve Employees)	\$1,075 Additional Per Month (Up to Twelve Employees)
Live bi-weekly turn-key payroll processing, tax payment, and tax return filings	\$775 Additional Per Month (Up to Twelve Employees)	\$745 Additional Per Month (Up to Twelve Employees)	\$685 Additional Per Month (Up to Twelve Employees)
Live semi-monthly turn-key payroll processing, tax payment, and tax return filings	\$720 Additional Per Month (Up to Twelve Employees)	\$695 Additional Per Month (Up to Twelve Employees)	\$640 Additional Per Month (Up to Twelve Employees)
Live monthly turn-key payroll processing, tax payment, and tax return filings	\$460 Additional Per Month (Up to Twelve Employees)	\$445 Additional Per Month (Up to Twelve Employees)	\$415 Additional Per Month (Up to Twelve Employees)
After-the-fact quarterly turn-key payroll processing and tax return filings	\$355 Additional Per Month (Up to Twelve Employees)	\$345 Additional Per Month (Up to Twelve Employees)	\$320 Additional Per Month (Up to Twelve Employees)
Forms 1099 processing and filing	\$30 Additional Per Month (Up to Twelve Contractors)	\$25 Additional Per Month (Up to Twelve Contractors)	\$25 Additional Per Month (Up to Twelve Contractors)

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<i>Empowering Advisory Services</i>			
Creative and effective strategy meetings between you and us designed to support your tax, financial, accounting or general business needs	N/A	N/A	Unlimited
Forward-looking tax projections and comparative analysis	N/A	\$240 Additional Per Month for One Comprehensive Plan	\$215 Additional Per Month 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
Inclusion of other business entities and the principles of the businesses in any advisory services offered (not available for tax or other compliance services)	N/A	\$25 Additional Per Month	Included
<i>Deliverable Items</i>			
One professional and durable bound paper copy of your tax returns	N/A	Included	Included
Digital PDF copy of your tax returns	Included	Included	Included
Recorded video review of your completed return	N/A	Included	Included
Live review of your completed return	N/A	N/A	Included
Price (Not Including Add-Ons)	\$230 Per Month	\$290 Per Month	\$760 Per Month

This package is well-suited for small businesses navigating the transition from a successful organization of a few individuals to a larger and more structured enterprise. It's common for businesses to move up to a higher membership level after a few years at this stage, especially as they undergo growth and establish systems to facilitate scalable operations.

A good example is an online marketing company featuring a couple of principal owner(s)/employees(s) managing the business, a small group of content generators, a sales staff of one or two individuals, a full or part-time controller, a couple of administrators and several contracted service providers. Companies in this dynamic space require robust systems to ensure accurate information for crucial decision-making. Despite having more intricate accounting needs, these companies may not have someone on staff with the necessary skill sets to effectively handle every emerging challenge.

Please note: Businesses reporting losses may have a cost structure indicative of the services offered in a different package or one that requires separate pricing. Please consider this when reviewing the details of this package.