

2025 Standard+ Package Pricing

	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	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
<i>Premium Income Tax Services</i>			
Strategy meeting prior to return preparation	N/A	N/A	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)	\$540 Additional	\$435 Additional	Included
Individual income tax credit reporting	Included	Included	Included
Traditional brokerage account reporting	Included	Included	Included
Schedules K-1 reporting (standard)	Up to Two Included	Up to Two Included	Up to Two Included
Schedules K-1 reporting (complex)	Up to Two Included	Up to Two Included	Up to Two Included
Rental property reporting	Up to Two Included	Up to Two Included	Up to Two 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	\$300 Per State Additional	\$260 Per State Additional	\$225 Per State Additional
Foreign disclosure reporting	\$395 Additional	\$345 Additional	\$300 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	\$160 Additional	Included
<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	\$310 Per Hour	Included
Forward-looking tax projections and comparative analysis	N/A	\$1,495 Additional for One Comprehensive Plan	\$1,300 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 Two 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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<i>Deliverable Items</i>			
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
<i>Price (Not Including Add-Ons)</i>	<i>\$1,370 Per year</i>	<i>\$1,660 Per year</i>	<i>\$250 Per Month</i>

Expanding upon the services offered in the Starter and Standard Packages, this package is designed for individuals who have departed from traditional financial models, seeking different approaches to securing financial well-being for themselves and their families. These individuals often require more advanced services and substantial advisory support to navigate the intricacies of making complex decisions. Specifically tailored for those involved in non-traditional investments or entrepreneurial pursuits, this package is an ideal fit for individuals actively managing a wide spectrum of diverse activities.

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. The other spouse may be involved in flipping real estate, developing land, holding rental properties, partnership activities with others, self-employment, etc. They may also have tax reporting requirements in multiple states and have 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.