

2025 Business Starter Package Pricing

Up to Around \$500K in Revenue

	<i>Support Level One</i>	<i>Support Level Two</i>	<i>Support Level Three</i>
General Features			
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 Levels
Premium Income Tax Services			
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)	\$1,155 Additional Per Filing	\$1,010 Additional Per Filing	Included
Separate state reporting in addition to the home state (per state income tax filing)	N/A	N/A	N/A
Separate franchise tax reporting if required (per taxing authority)	N/A	N/A	N/A
Special allocations of income and losses (generally an advanced feature of Partnership)	N/A	N/A	N/A
General business income tax credits reporting	N/A	Included	Included
Consolidated tax reporting (only required if additional tax filings are necessary)	N/A	N/A	N/A
Audit defense and support allowing you to focus on your business and us to focus on your IRS or state audit	N/A	\$20 Additional Per Month	Included
Other Premium Tax Services			
Sales tax payment and reporting (per state)	\$240 Additional Per Month	\$230 Additional Per Month	\$210 Additional Per Month
Business personal property tax reporting (per taxing authority)	\$30 Additional Per Month	\$30 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)	N/A	N/A	N/A
Compiled financial statements on a tax basis w/o note disclosure (formal CPA prepared financial statements accompanied by a report)	\$145 Additional Per Month	\$140 Additional Per Month	\$125 Additional Per Month
Audited or reviewed financial statement preparation assistance and coordination (per issued statement)	N/A	N/A	N/A
Annual closing of the books (tidy-up)	Included	Included	Included
Annual closing of the books (more than just a tidy-up)	\$55 Additional Per Month	\$50 Additional Per Month	\$45 Additional Per Month
Setup and customization of your accounting system (QuickBooks Online or QuickBooks Desktop)	\$575 One-time Setup	\$550 One-time Setup	\$500 One-time Setup
Detailed and accurate annual bookkeeping for preparation of the income tax returns	\$110 Additional Per Month	\$105 Additional Per Month	\$95 Additional Per Month
Timely, accurate and informative quarterly bookkeeping for use in tax return preparation and business management	\$370 Additional Per Month	\$250 Additional Per Month	\$225 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	N/A	\$500 Additional Per Month	\$455 Additional Per Month
Fractional CFO services custom designed to meet your day-to-day accounting and finance needs	N/A	N/A	N/A
Unlimited as needed professional bookkeeping support for you and your staff	\$65 Additional Per Month	\$60 Additional Per Month	\$55 Additional Per Month
<i>Best in Class Payroll Services</i>			
Setup and customization of your payroll processing system (QuickBooks Online or QuickBooks Desktop)	\$290 One-time Setup	\$275 One-time Setup	\$250 One-time Setup
Live weekly turn-key payroll processing, tax payment, and tax return filings	\$475 Additional Per Month (Up to Four Employees)	\$460 Additional Per Month (Up to Four Employees)	\$420 Additional Per Month (Up to Four Employees)
Live bi-weekly turn-key payroll processing, tax payment, and tax return filings	\$310 Additional Per Month (Up to Four Employees)	\$295 Additional Per Month (Up to Four Employees)	\$275 Additional Per Month (Up to Four Employees)
Live semi-monthly turn-key payroll processing, tax payment, and tax return filings	\$290 Additional Per Month (Up to Four Employees)	\$280 Additional Per Month (Up to Four Employees)	\$255 Additional Per Month (Up to Four Employees)
Live monthly turn-key payroll processing, tax payment, and tax return filings	\$190 Additional Per Month (Up to Four Employees)	\$185 Additional Per Month (Up to Four Employees)	\$170 Additional Per Month (Up to Four Employees)
After-the-fact quarterly turn-key payroll processing and tax return filings	\$150 Additional Per Month (Up to Four Employees)	\$145 Additional Per Month (Up to Four Employees)	\$140 Additional Per Month (Up to Four Employees)
Forms 1099 processing and filing	\$15 Additional Per Month (Up to Four Contractors)	\$15 Additional Per Month (Up to Four Contractors)	\$15 Additional Per Month (Up to Four 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	\$115 Additional Per Month for One Comprehensive Plan	\$105 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	\$20 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
<i>Price (Not Including Add-Ons)</i>	<i>\$140</i> <i>Per Month</i>	<i>\$180</i> <i>Per Month</i>	<i>\$465</i> <i>Per Month</i>

This package is well-suited for startups or mature businesses with modest gross revenue of zero up to \$500k per year. This is generally thought of as an entry level package, however, long-term membership may also be appropriate.

A good example would be an attorney's office with one professional, a couple of paraprofessionals, and an administrative person. These types of businesses are working to establish regular operating workflows and are looking for help with general tax and accounting issues. Frequently, educating the principal owner(s)/employee(s) regarding compliance requirements is part of the relationship.

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.