

2025 Starter Package Pricing

	<i>Support Level One</i>	<i>Support Level Two</i>	<i>Support Level Three</i>
<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	N/A
Payment via auto pay	N/A	N/A	N/A
Priority service	N/A	N/A	Priority Over Lower 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)	\$330 Additional	\$290 Additional	Included
Individual income tax credit reporting	Included	Included	Included
Traditional brokerage account reporting	N/A	Up to One Included	Up to One Included
Schedules K-1 reporting (standard)	N/A	N/A	N/A
Schedules K-1 reporting (complex)	N/A	N/A	N/A
Rental property reporting	N/A	N/A	N/A
Sole-proprietorship reporting	N/A	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	N/A	N/A	N/A
Foreign disclosure reporting	N/A	N/A	N/A
Separate dependent child return	N/A	N/A	N/A
Audit defense and support allowing you to focus on your life and us to focus on your IRS or state audit	N/A	\$60 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	N/A	\$285 Per Hour
Forward-looking tax projections and comparative analysis	N/A	N/A	N/A
Powerful ad hoc advisory services designed and executed in partnership with you and your team	N/A	N/A	N/A
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	N/A	Included
Recorded video review of your completed return	N/A	Included	Included
Live review of your completed return	N/A	N/A	N/A
Personal compiled financial statement preparation (per issued statement)	N/A	N/A	N/A
<i>Price (Not Including Add-Ons)</i>	<i>\$425 Per year</i>	<i>\$700 Per year</i>	<i>\$1,295 Per year</i>

This package is well-suited for young adults starting out on their own or those who have, for the most part, a simple return. This is generally thought of as an entry level package, however, it is equally suitable for those seeking long-term membership.

A good example would be a joint return with two kids in which the parents are both employed and receive Forms W-2 reporting wages earned. This situation also allows for itemized deduction reporting, child tax credits, and a few other standard items of reporting that can vary between clients.