

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.

2024 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	Included
Return preparation scheduling	N/A	N/A	Included
Pre-payment discount (add-on services not included)	N/A	N/A	5%
<i>Premium Income Tax Services</i>			
Strategy meeting prior to return preparation	Included	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)	\$1,170 Additional	\$1,170 Additional	\$1,170 Additional
Individual income tax credit reporting	Included	Included	Included
Traditional brokerage account reporting	Included	Included	Included
Schedules K-1 reporting	Three Included	Three Included	Three Included
Rental property reporting	Two Included	Two Included	Two Included
Sole-proprietorship reporting	One Included	One Included	One Included
Separate state reporting in addition to the home state	\$250 Per State Additional	\$250 Per State Additional	Up to Two States Included
Foreign disclosure reporting	Priced Separately	Priced Separately	Priced Separately
Separate dependent child return	\$390 Additional Per Child Return	\$360 Additional Per Child Return	\$300 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	\$1,170 Additional	Included

2024 Standard+ Package Pricing

	Support Level One	Support Level Two	Support Level Three
<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	\$1,800 Additional for One Comprehensive Plan	Included
Powerful advisory services designed and executed in partnership with you and your team	N/A	Priced Separately	Priced Separately
Collaborative, goal oriented meetings between us, your bankers, financial advisors, attorneys or other professional service providers	N/A	N/A	Included
Tax related questions designed to help you better understand your overall tax position.	Up to Two Per Year	Up to Three Per Year	Included
<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	\$20 Additional	Included	Included
Recorded video review of your completed return	N/A	Included	Included
Live review of your completed return	N/A	Included	Included
Personal compiled financial statement preparation (per issued statement)	N/A	N/A	One Included
Price (Not Including Add-Ons)	\$1,460 Per year	\$1,835 Per year	\$830 Per Month

Important notes:

- If you does not fit nicely into the Standard+ Package take a look at the others to see if there is a better fit.
- If something is "N/A" don't worry. You are allowed to move between packages at anytime for a prorated amount.
- While we work very hard to ensure that all our clints are well cared for, priority service is only provided to our Support Level Three subscribers. Elite Package members are always granted top priority followed by Standard+ and so on.
- See our website for important notes regarding our packaged services.