

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.

Please note: This package is only available to grandfathered clients and the friends and family of our "Standard", "Standard+", and "Elite" package members.

2024 Starter 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	N/A
Payment via auto pay	N/A	N/A	N/A
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	N/A
<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)	\$375 Additional	\$375 Additional	\$375 Additional
Individual income tax credit reporting	Included	Included	Included
Traditional brokerage account reporting	N/A	N/A	N/A
Schedules K-1 reporting	N/A	N/A	N/A
Rental property reporting	N/A	N/A	N/A
Sole-proprietorship reporting	N/A	N/A	N/A
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	\$375 Additional	Included

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	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	N/A
Forward-looking tax projections and comparative analysis	N/A	N/A	N/A
Powerful advisory services designed and executed in partnership with you and your team	N/A	N/A	N/A
Collaborative, goal oriented meetings between us, your bankers, financial advisors, attorneys or other professional service providers	N/A	N/A	N/A
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	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
Price (Not Including Add-Ons)	\$470 Per year	\$595 Per year	\$950 Per year

Important notes:

- If you does not fit nicely into the Starter 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.