

This package is our most comprehensive package. It is best suited for trailblazers who demand a lot from themselves, and who fully anticipate harvesting the rewards of astute decision-making and hard work. Tailored for individuals with diverse and ambitious pursuits, this package places a strong emphasis on advisory support, recognizing the importance of navigating complex topics such as estate planning, tax minimization, and business continuity.

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 and works as a corporate board member on the side. The other spouse may be fully engaged in managing a successful business, flipping real estate, managing commercial real estate holdings, diverse partnership activities with others, and any number of other activities. Often, they are engaged in more than one of these varied activities simultaneously. They typically receive several complex Schedules K-1 from partnerships or S-corporations of which they are members. They may also have tax reporting requirements in multiple states, require disclosure of foreign activities, and have multiple 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 Elite Package Pricing

	Support Level One	Support Level Two	Support Level Three
General Features			
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%
Premium Income Tax Services			
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)	\$3,855 Additional	\$3,855 Additional	\$3,855 Additional
Individual income tax credit reporting	Included	Included	Included
Traditional brokerage account reporting	Included	Included	Included
Schedules K-1 reporting	Included	Included	Included
Rental property reporting	Included	Included	Included
Sole-proprietorship reporting	Two Included	Two Included	Two Included
Separate state reporting in addition to the home state	\$300 Per State Additional	\$300 Per State Additional	Up to Four 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	\$3,855 Additional	Included

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Empowering Advisory Services			
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	\$3,000 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
Assessment of your financial position by our friends at Horizon Financial Services, LLC	N/A	N/A	
Deliverable Items			
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)	\$4,820 Per year	\$5,330 Per year	\$1,430 Per Month

Important notes:

- If you does not fit nicely into the Elite 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.