

2025 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	Priority Over Lower Packages/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)	\$435 Additional	\$360 Additional	Included
Individual income tax credit reporting	Included	Included	Included
Traditional brokerage account reporting	Up to Two Included	Up to Two Included	Up to Two Included
Schedules K-1 reporting (standard)	Up to One Included	Up to One Included	Up to One Included
Schedules K-1 reporting (complex)	N/A	N/A	Up to One Included
Rental property reporting	N/A	Up to One Included	Up to One Included
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	\$230 Per State Additional	\$200 Per State Additional	\$175 Per State Additional
Foreign disclosure reporting	\$265 Additional	\$230 Additional	\$200 Additional
Separate dependent child return	\$410 Additional Per Child Return	\$355 Additional Per Child Return	\$310 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	\$110 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	\$310 Per Hour	Included
Forward-looking tax projections and comparative analysis	N/A	\$1,150 Additional for One Comprehensive Plan	\$1,000 Additional 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
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	Included	Included
Recorded video review of your completed return	N/A	Included	Included
Live review of your completed return	N/A	N/A	Included
Personal compiled financial statement preparation (per issued statement)	N/A	N/A	N/A
<i>Price (Not Including Add-Ons)</i>	<i>\$745 Per year</i>	<i>\$955 Per year</i>	<i>\$180 Per Month</i>

This package expands on the offerings of our Starter Package. It is well-suited for mature adults who maintain regular employment, possess investments in traditional securities, and may have diversified with a few alternative investment ventures.

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. They also have a couple of brokerage accounts reporting gains, losses, dividends, and interest. They may also have a rental property and/or be a member of a partnership. This situation also allows for itemized deduction reporting, common tax credits, and a few other standard items of reporting that can vary between clients.