



STEP 1

CLIENT ONBOARDING

Two Meetings

\$750

- Based on Your Expected Income and Overall Tax Situation:
 - Business Structure Recommendations (LLC, S-Corp, etc.)
 - Tax Snapshot - Federal, State, and Local Tax Overview
 - Discussion on the Importance of a "Tax Home"
 - Introduction to Typical Business Expenses
 - Recommendations for Tracking Income and Expenses
 - Recommendations for Retirement Accounts and Potential Contribution Amounts - Solo 401K vs. SEP-IRA

STEP 2

MONTHLY ACCOUNTING

One Annual Meeting

**Starting at
\$350/Month**

- Monthly Income and Expense Tracking
- Credit Card, Bank Account, and Loan Reconciliation
- Monthly Financial Reporting
- Quarterly Tax Projections
- Includes Annual Meeting to discuss Tax Planning, Future Plans Including Solo 401k and HSA Contributions, and Future Assignments
- Regular Email Support

STEP 3

TAX RETURN PREP AND FILING

**Starting at \$1,200/
Federal Return**

**Starting at \$250/
State Return**

**Starting at \$125/
Local Return**

- Sit back and relax while we take the load off you!
- Must be monthly accounting client

ADDITIONAL SERVICES

ADD-ON SERVICES

**Additional Fees
Apply**

- Catch-Up Monthly Accounting
- Electing S-Corp Business Status
- Payroll Services (S-Corp Only)
- Special or Non-Annual Tax Filings as Required by States
- Rental Real-Estate Tax Planning and Accounting
- Annual 1099 Preparation
- Additional Meetings Outside the Normal Scope
- Must be monthly accounting client



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[SCHEDULE AN INTRO MEETING HERE!](#)

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