



# PACKAGE OFFERINGS

We offer a variety of concierge packages to small business owners and busy professionals

| CONCIERGE INDIVIDUAL PACKAGES                                                                                                        | PREMIUM                                    | ESSENTIAL           | BASIC               |
|--------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|---------------------|---------------------|
| <b>Virtual Meetings</b>                                                                                                              | ✓                                          | ✓                   | ✓                   |
| <b>Video and Screen Cast Communication</b>                                                                                           | ✓                                          | ✓                   | ✓                   |
| <b>24/7 Cloud to Gather, Organize, and Sign Tax Docs</b>                                                                             | ✓                                          | ✓                   | ✓                   |
| <b>Confidentiality &amp; Nondisclosure Agreements Signed</b>                                                                         | ✓                                          | ✓                   | ✓                   |
| <b>1 Personal Federal and 1 State Tax Returns*</b>                                                                                   | ✓                                          | ✓                   | ✓                   |
| <b>Frequency of Tax Strategies (Estimates)</b>                                                                                       | <i>Any time</i>                            | <i>Quarterly</i>    | <i>Annual</i>       |
| <b>Priority Meetings</b>                                                                                                             | <i>Any time<br/>(scheduled in advance)</i> | <i>Quarterly</i>    | <i>Once a year</i>  |
| <b>Year End Tax Planning Guide</b>                                                                                                   | ✓                                          | ✓                   | ✓                   |
| <b>Email/Newsletter Alerts</b>                                                                                                       | ✓                                          | ✓                   | ✓                   |
| <b>Current Year Amended Returns - up to 1 business or personal</b>                                                                   | ✓                                          | <i>Separate Fee</i> | <i>Separate Fee</i> |
| <b>Due Dates Monitoring</b>                                                                                                          | ✓                                          | ✓                   | ✗                   |
| <b>IRS notice responses</b><br><small>IRS notices are covered under a period of 3 years</small>                                      | ✓                                          | ✓                   | ✗                   |
| <b>Documents Pickup/Delivery Service</b>                                                                                             | ✓                                          | ✓                   | ✗                   |
| <b>Planning Meeting with your Financial/Estate Team</b><br><small>(additional fee might apply by your Financial/Estate Team)</small> | ✓                                          | ✗                   | ✗                   |
| <b>IRS Audit Representation</b><br><small>Returns prepared by us. Covered under a period of 3 years.</small>                         | ✓                                          | ✗                   | ✗                   |
| <b>Priority Access</b>                                                                                                               | ✓                                          | ✗                   | ✗                   |
| <b>VIP Rewards</b>                                                                                                                   | ✓                                          | ✗                   | ✗                   |
| <b>One-Time Onboarding Fee (Custom Quoted)</b>                                                                                       | Quoted                                     | Quoted              | Quoted              |
| <b>Backwork and Amended Returns</b>                                                                                                  | Quoted                                     | Quoted              | Quoted              |
| <b>QuickBooks Online Accounting Package</b>                                                                                          | Quoted Flat Fee                            | Quoted Flat Fee     | Quoted Flat Fee     |

On-boarding and monthly fees are custom quoted. Monthly fees are subject to change with prior notice.

\* 1 Fed & State Ind tax return(s) completed by return deadline including extensions as long as the client is current on a monthly plan and all required documents are provided on time. Any incomplete services, including unfinished tax preparation, will be immediately terminated if a monthly plan is canceled. Recurring procrastinators will be assessed late fees and potential termination of our agreement. We try to complete tasks within two weeks and ask that you turn in necessary information by our requested dates (DARB - Deadline Action Required By).