

# MENU OF SERVICES

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# MENU OF SERVICES

## EDUCATION

**\$1,200** ONE-TIME

- VIDEO COURSE BUNDLES
- TAX STRATEGIES
- TEMPLATES, FAQs, GLOSSARY
- DIGITAL DELIVERY
- MOBILE APP
- GROUP COACHING CALLS
- LIVE Q&A
- REPLAYS

## TAX PREPARATION

**\$1,800+/YEAR**

- FEDERAL & STATE RETURNS
- 1120S, 1065, BUSINESS FILINGS
- 1040 PERSONAL FILING W/SCH E.

## TAX PLANNING

**\$3K-\$10K**

**VARIES** ONE-TIME & ONGOING

- 4x 1 HR. CPA TAX PLANNING CALLS
- TAX PLAN DELIVERABLE
- TAX PROJECTIONS
- PRIOR-YEAR TAX RETURN ASSESSMENT
- E-MAIL & CHAT SUPPORT
- IRS LETTER REVIEW

## ACCOUNTING

**\$XXX/MO+**

- FINANCIAL STATEMENTS
- BOOKKEEPING
- KPI ANALYSIS

# **EDUCATION** **\$1,200** ONE-TIME

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**Convenient learning for clients**  
**Anytime, Anywhere!**



**KAJABI**

# TAX PLANNING VARIES \$3K-\$10K

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- E-MAIL & CHAT SUPPORT
- IRS LETTER REVIEW
- AI SWIPE FILE, CUSTOM GPT's
- Much More.....

 TAXDOME

 ZOOM

 LOOM

# **TAX PREPARATION** **\$1,800+/YEAR**

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- 1120S, 1065, BUSINESS FILINGS
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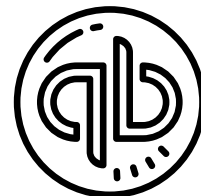
**TAXDOME**

# ONESTOP.CPA SERVICES

**ACCOUNTING \$XXX/MO+**

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- FINANCIAL STATEMENTS
- BOOKKEEPING
- KPI ANALYSIS



**QUICKBOOKS**

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## ACCOUNTING



**\$XXX/MO+**

- FINANCIAL STATEMENTS
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- KPI ANALYSIS

# ONGOING SERVICES

## ACCOUNTING

### S-CORPORATION BUNDLE W/TAX PREP.

**\$XXX/MO.**

#### S-CORPORATION BUNDLE

- ✓ ACCOUNTING (1 ENTITY, UP TO 4 ACCOUNTS)
- ✓ TAXDOME CLIENT PORTAL (FREE)
- ✓ INCLUDES **TAX PREPARATION** (1120S)
- ✓ INCLUDES **BOOKKEEPING**

#### ADD-ONS (NOT INCLUDED):

- QUICKBOOKS ONLINE ADD'L (\$+)
- PAYROLL PROCESSING ADD'L (\$+)

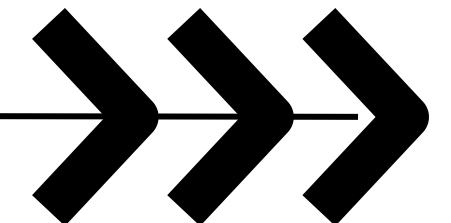
- ✓ PRIOR-YEAR TAX RETURN ASSESSMENT
- ✓ BASIC TAX PLANNING
- ✓ BASIC FINANCIAL STATEMENTS
- ✓ +TAX TIPS & STRATEGIES
- ✓ +GLOSSARY
- ✓ +FREE TEMPLATES



## TAX PREPARATION

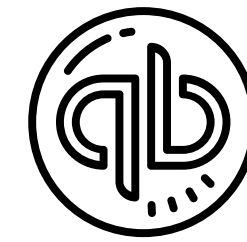
**~~\$1,800+~~/YEAR**

- FEDERAL & STATE RETURNS
- 1120S, 1065, BUSINESS FILINGS
- FINCEN FILINGS, IRS REPRESENTATION
- PERSONAL 1040 W/SCH. E INCLUDED





# ONGOING SERVICES



**gusto**

## ACCOUNTING

### S-CORPORATION BUNDLE W/TAX PREP. & SOFTWARE

**\$XXX/MO.**

#### S-CORPORATION BUNDLE

- ✓ ACCOUNTING (1 ENTITY, UP TO 4 ACCOUNTS)
- ✓ TAXDOME CLIENT PORTAL (FREE)
- ✓ INCLUDES **TAX PREPARATION** (1120S)
- ✓ INCLUDES **BOOKKEEPING**
- ✓ QUICKBOOKS ONLINE (ESSENTIALS)
- ✓ PAYROLL PROCESSING (GUSTO)

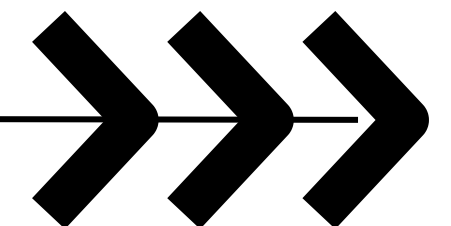
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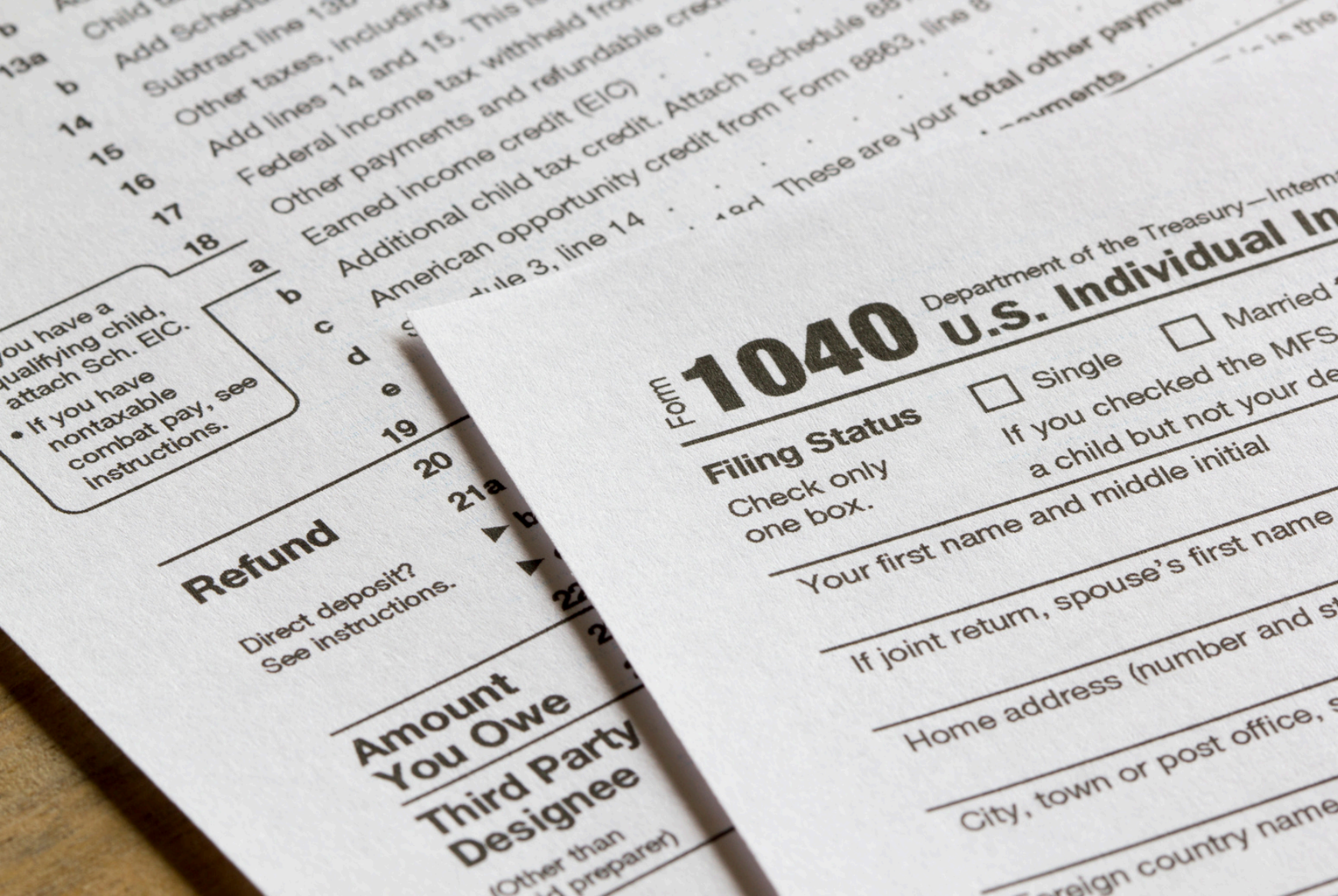


## TAX PREPARATION

**~~\$1,800+~~/YEAR**

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# ANNUAL PERSONAL FILINGS 1040, STATES

- **Personal Tax Filing (Form 1040 w/Schedule E):**
  - **After the year is closed, your payroll filings and income tax filings will be prepared.**
  - **Once your personal tax forms are in, you upload those through TaxDome.**
  - **W2s, 1098, 1099s, Spouse, Dependent, etc.**
  - **Predictable Balance Due or Refund. (1040 With Tax Planning)**

# GETTING STARTED



**BRIAN DAVIS, CPA**



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*Thank  
you!*