

MENU OF SERVICES

EDUCATION



\$1,200 ONE-TIME

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

TAX PREPARATION



\$1,800+/YEAR

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

PLANNING

VARIES ONE-TIME & ONGOING **\$3K-\$10K**

- CPA TAX PLANNING CALLS & CHECK-INS
- PRIOR-YEAR TAX RETURN ASSESSMENT
- TAX PLAN DELIVERABLE
- TAX BILL PROJECTIONS
- E-MAIL & CHAT SUPPORT
- IRS LETTER REVIEW

ACCOUNTING



\$500/MO+

- BOOKKEEPING
- FINANCIAL STATEMENTS
- KPI TRACKING