



GUIDE THE INDUSTRY • BEST PRODUCTS • HONESTY & SERVICE

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YEAR-ROUND TAX SUPPORT PLANS

Reliable guidance. Proactive planning. Peace of mind—year-round.

These plans are designed to provide ongoing tax support, answer your questions, and help you stay organized and prepared—so you're never caught off guard at tax time.



ESSENTIAL TAX SUPPORT PLAN

\$40 / MONTH
or \$480 / YEAR

INCLUDES:

- ✓ Preparation and filing of your annual tax return
- ✓ Secure email/portal support throughout the year
- ✓ Guidance on tax notices you receive (W-2, 1099, IRS letters)
- ✓ Answers to general tax questions as life changes occur
- ✓ Tax readiness checklist before filing season

NOT INCLUDED:

- Quarterly estimated tax calculations
- Business income review or planning
- Bookkeeping or record cleanup

BEST FOR:

W-2 employees, retirees, and households with straightforward income.



SELF-EMPLOYED TAX SUPPORT PLAN

\$100 / MONTH
or \$1,200 / YEAR

INCLUDES EVERYTHING IN THE ESSENTIAL PLAN, PLUS:

- ✓ Quarterly estimated tax calculations and reminders
- ✓ Year-round tax planning for self-employed income
- ✓ IRS notice handling and response support
- ✓ Review of income and expenses for tax accuracy
- ✓ Proactive guidance to avoid surprises at filing time

NOT INCLUDED:

- Monthly bookkeeping or transaction entry
- Payroll processing

BEST FOR:

Independent contractors, freelancers, and small business owners.



BOOKKEEPING OVERSIGHT (ADD-ON)

\$200 / MONTH

FOR CLIENTS WHO MANAGE THEIR OWN BOOKS BUT WANT PROFESSIONAL REVIEW.

INCLUDES:

- ✓ Monthly or quarterly review of income & expense reports
- ✓ Tax-readiness checks
- ✓ Identification of issues before tax season
- ✓ Coordination for clean, accurate tax filing

NOTE:

Client maintains bookkeeping system; this is review and oversight only.



MY COMMITMENT TO YOU

My goal is to provide dependable, year-round guidance so you can make informed decisions, avoid surprises, and feel confident about your financial future.

I'm here to help you every step of the way.

PLANS ARE OPTIONAL. CLIENTS WHO CHOOSE NOT TO ENROLL WILL STILL BE WELCOME TO WORK WITH ME FOR TAX RETURN PREPARATION ONLY, BILLED SEPARATELY DURING TAX SEASON.