

# Silver Maintenance Package

THE "SILVER" MAINTENANCE PACKAGE IS DESIGNED FOR NEW BUSINESS OWNERS AND INVESTORS WHO WANT A STRONG TAX FOUNDATION. YOU GET THESE ONGOING SERVICES:



- **Business Tax Preparation.** We'll prepare your primary business entity return (proprietorship, partnership, or corporation). (Additional entities may incur an additional charge.)
  - Tax return preparation is included with our Tax Maintenance package **after 12 months** of being onboarded in our program. Tax return preparation services will incur a separate fee until the one-year mark is reached.
- **Personal Tax Preparation.** We'll prepare your federal, state, and local personal tax returns.
  - Tax return preparation is included with our Tax Maintenance package **after 12 months** of being onboarded in our program. Tax return preparation services will incur a separate fee until the one-year mark is reached.
- **Phone Consultations.** You can schedule **three** 15-minute phone consultations, at your convenience throughout the year, to address breaking Issues and opportunities throughout the year.
- **Email Consultations.** You can email up to **three** specific questions, at your convenience, for written responses.
- **Tax Alerts.** You'll get our weekly email alerts and monthly newsletter with timely tips for making the most of your money.
- **Due Date Monitoring.** You'll get our Due Date Monitoring service to ensure you never miss an important tax deadline again.
- **Year-End Sit-Down.** You'll get a year-end "sit down" meeting to review your tax picture. We'll update you with everything you need to know about deductions you can take, anticipating tax roadblocks and opportunities, avoiding IRS audits, and maintaining your personal IRS tax plan based on your changing personal circumstances.
- **Open Questions.** Finally, your year-end sit-down includes an open Q&A period. This is your chance to ask us any questions about
  - Financing
  - Business Valuation
  - Insurance Needs
  - Lease/Buy Analysis
  - Business Structure (C-Corp, S-Corp, LLC, Partnership, Sole Prop)
  - Personal Financial Planning
  - Retirement Planning
  - Estate Planning
- **Quarterly Assessment.** Quarterly Profit Reviews **via Email**. These are evaluations of your profit performance and percentage adjustments if necessary.
- **Monthly Q&A Session.** As part of our tax maintenance program, we now offer monthly online Q&A sessions with Agent Rae. These sessions are designed to address a variety of topics and answer your questions. Participation is optional and included as an enhanced service within your package. The sessions are held on the 2nd Thursday of each month from 3:00 PM to 5:00 PM. Teams meeting link will be sent to you through email.

You'll take advantage of ProActive Tax Strategies that most accountants miss to minimize your taxes. (This alone will pay for our service!) You'll sleep well knowing we're doing everything to prevent audits. And you'll have access to a trusted business advisor to answer pressing financial questions.

YOUR INVESTMENT IN THE "SILVER" MAINTENANCE PACKAGE IS JUST **\$400/MONTH**, BILLED DIRECTLY TO YOUR CREDIT CARD. THAT'S **LESS THAN \$14/DAY** FOR PROACTIVE TAX PLANNING AND PREPARATION THAT CAN SAVE YOU THOUSANDS, YEAR AFTER YEAR. YOU CAN PAY THAT MUCH FOR YOUR MORNING BREAKFAST AND COFFEE. IF YOU'RE SERIOUS ABOUT MINIMIZING YOUR TAXES, THAT SHOULD BE AN EASY DECISION.