

1040 Premium Service Package

Questions and Answers

What does the 1040 Premium Service Package include?

This service plan is one of three subscription-based plans for becoming a client of our firm and is ideal for clients who do not require corporate tax work but are looking for a year-round relationship with a tax advisor. The package includes a structured service plan, with a dedicated point of contact, plus:

- 1040 Tax Preparation and Filing
- Tax Review and Planning Meetings
- IRS Notice Response
- Access to Bookkeeping Services (for Schedule C or Schedule E)
- Prioritized Access to Advisory Services

How will this benefit me?

By serving a select group of clients who are committed to a year-round relationship, we will be able to do our best work. You will have access to a dedicated tax accountant to answer questions, provide advice and provide guidance throughout the year, not just at tax time.

How much does it cost?

Pricing *begins* at \$150 per month. Factors that affect pricing are complexity and time necessary to do the work. The agreements are annual and run from April 1 thru March 31 of the next year. Payments are made via automatic credit card charge on the 5th of every month.

Can I just bring my tax work in at the end of the year to get my tax return prepared?

We will no longer be able to service once per year “drop off” work.

What else makes a client a good fit for this service model?

Clients who may be a good fit for this service include those clients who:

- See the value in having a year-round partner
- Are motivated to keep their tax work organized and up to date.
- Take a collaborative approach to working with a client service professional.