

Tax & Advisory



Built specifically for independent business owners



Tax strategies that help you keep more of what you earn



Year-round support for your business and personal finances

What you get

	Tax Prep & Filing \$799/year Tax filing only (no advisory)	Financial Planning \$149/month Planning only (no tax prep)	Financial Concierge \$279/month Full-service for S Corps & complex needs
Tax Returns Included			
Personal tax return - federal & 1 state	✓	—	✓
Schedule C (sole proprietor/single-member LLC business income)	1 business	—	1 business
Business entity return (S Corp or Partnership) - federal & 1 state	—	—	1 entity
Tax Services & Support			
Annual tax return preparation, e-filing, and extensions	✓	—	✓
Quarterly estimated tax calculations (4x per year)	✓	—	✓
IRS notice response and correspondence	✓	—	✓
Common Business Deductions			
Home office deduction	✓	—	✓
Business vehicle and mileage deduction	✓	—	✓
Self-employed health insurance	✓	—	✓
Retirement contributions (SEP-IRA, Solo 401k, etc.)	✓	—	✓

Tax Prep & Filing
\$799/year
 Tax filing only (no advisory)

Financial Planning
\$149/month
 Planning only (no tax prep)

Financial Concierge
\$279/month
 Full-service for S Corps & complex needs

	Tax Prep & Filing	Financial Planning	Financial Concierge
S Corp & Advanced Business			
S Corp setup and reasonable compensation analysis	—	—	✓
K-1s issued (for multi-owner entities)	—	—	Up to 2
Complex business situations (revenue >\$250k, inventory, etc.)	—	—	✓
Investments & Property			
Investment income and retirement accounts (1099s, stock options, HSA, Roth conversions)	✓	—	✓
Cryptocurrency (basic reporting)	✓	—	✓
Primary home mortgage interest	✓	—	✓
Rental properties (separate from your business)	—	—	Up to 5
K-1s received (from partnerships, syndications, trusts)	—	—	Up to 5
Financial Planning & Advisory			
Certified Financial Planner™ (CFP®) access	—	✓	✓
Comprehensive financial plan (business & personal)	—	✓	✓
Year-end tax planning review	—	✓	✓
Business entity and tax structure strategy (sole prop, LLC, S Corp, C Corp)	—	✓	✓
Cash flow planning and management	—	✓	✓

	Tax Prep & Filing \$799/year Tax filing only (no advisory)	Financial Planning \$149/month Planning only (no tax prep)	Financial Concierge \$279/month Full-service for S Corps & complex needs
Insurance and employee benefits strategy	—	✓	✓
Retirement planning (account selection, contributions, investments)	—	✓	✓
Owner's compensation & profit distribution strategy	—	✓	✓
Personal and business planning (exit strategy, estate, wills, emergency fund)	—	✓	✓
Debt management and credit strategy	—	✓	✓
Communication & Support			
Messaging support	Tax questions	Unlimited	Unlimited
Video calls with your advisor	Annual	Quarterly + as needed	Unlimited

Need Something Specific?

Most independent business owners fit perfectly into one of these packages. However, some situations may require add-on services, such as:

- Multiple businesses (more than one LLC, S Corp, or Partnership)
- Multiple Schedule Cs (e.g., main business + side business)
- Additional states (beyond your home state)
- More than 5 rental properties or 5 K-1s received (Financial Concierge)
- Prior year returns (catch-up or amendments)
- Complex cryptocurrency transactions (wallets, missing cost basis, multiple platforms)

If your situation is more complex, let us know so we can provide a transparent quote for any additional services needed.