

# Modern financial advising



Built for small business owners and entrepreneurs



Tax prep and filing available as an add-on



Year-round support for your business finances

## What you get

	<b>Essential</b> <b>\$150/month</b> Financial planning only (no tax prep)	<b>Premium</b> <b>\$300/month</b> Planning + personal tax with Schedule C	<b>Complete</b> <b>\$467/month</b> Planning + personal & business entity tax
<b>Financial Planning &amp; Advisory</b>			
Certified Financial Planner™ (CFP®) access	✓	✓	✓
Comprehensive financial plan (business & personal)	✓	✓	✓
Quarterly financial reviews (4x per year)	✓	✓	✓
Year-end tax planning review	✓	✓	✓
Business entity and tax structure strategy (sole prop, LLC, S Corp, C Corp)	✓	✓	✓
Cash flow planning and management	✓	✓	✓
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	✓	✓	✓

	Essential \$150/month Financial planning only (no tax prep)	Premium \$300/month Planning + personal tax with Schedule C	Complete \$467/month Planning + personal & business entity tax
<b>Tax Returns Included</b>			
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
<b>Tax Services &amp; Support</b>			
Annual tax return preparation, e-filing, and extensions	—	✓	✓
Quarterly estimated tax calculations (4x per year)	—	✓	✓
IRS notice response and correspondence	—	✓	✓
<b>Common Business Deductions</b>			
Home office deduction	—	✓	✓
Business vehicle deduction	—	✓	✓
Self-employed health insurance	—	✓	✓
Retirement contributions (SEP-IRA, Solo 401k, etc.)	—	✓	✓
<b>S Corp &amp; Advanced Business</b>			
S Corp setup and reasonable compensation analysis	—	—	✓
K-1s issued (for multi-owner entities)	—	—	Up to 2
Complex business situations (revenue >\$250k, inventory, etc.)	—	—	✓

**Essential****\$150/month**Financial planning only  
(no tax prep)**Premium****\$300/month**Planning + personal tax  
with Schedule C**Complete****\$467/month**Planning + personal &  
business entity tax**Investments & Real Estate**Investment income and retirement  
accounts (1099s, stock options, HSA,  
Roth conversions)

—

✓

✓

Cryptocurrency (basic reporting)

—

✓

✓

Primary home mortgage interest

—

✓

✓

Rental properties (including short-term  
rentals like Airbnb)

—

Up to 2

Up to 5

K-1s received (from partnerships,  
syndications, trusts)

—

Up to 2

Up to 5

**Communication & Support**

Messaging support

Unlimited

Unlimited

Unlimited

Video calls with your advisor

Unlimited

Unlimited

Unlimited

**Need Something Specific?**

Most small 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 2 rental properties or 2 K-1s (Premium) / 5 rental properties or 5 K-1s (Complete)
- 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.