

Modern financial advising



Expert financial planning from certified advisors



Tax prep and filing available as an add-on



Year-round support for your finances

What you get

Premium

\$99/month

Financial planning only (no tax prep)

Complete

\$154/month

Financial planning + personal tax filing

Financial Planning & Advisory	Premium	Complete
Certified Financial Planner™ (CFP®) access	✓	✓
Comprehensive financial plan (personal & household)	✓	✓
Quarterly financial reviews (4x per year)	✓	✓
Year-end tax planning review	✓	✓
Cash flow planning and budgeting	✓	✓
Retirement planning (account selection, contributions, investments)	✓	✓
Investment portfolio review and rebalancing	✓	✓
Insurance and risk management strategy	✓	✓
Estate planning guidance (wills, trusts, beneficiaries)	✓	✓
Tax optimization strategies	✓	✓
Debt management and credit strategy	✓	✓

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Tax Returns Included		
Personal tax return - federal & 1 state	—	✓
Schedule C (for household side income like consulting, freelancing)	—	1 business
Tax Services & Support		
Annual tax return preparation, e-filing, and extensions	—	✓
Quarterly estimated tax calculations (4x per year)	—	✓
IRS notice response and correspondence	—	✓
Common Deductions		
Home office deduction	—	✓
Self-employed health insurance	—	✓
Retirement contributions (SEP-IRA, Solo 401k, etc.)	—	✓
Investments & Property		
Investment income and retirement accounts (1099s, stock options, RSUs, HSA, Roth conversions)	—	✓
Cryptocurrency (basic reporting)	—	✓
Primary home mortgage interest	—	✓
Rental properties	—	Up to 2
K-1s received (from partnerships, syndications, trusts)	—	Up to 2

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Communication & Support

Messaging support

Unlimited

Unlimited

Video calls with your advisor

Unlimited

Unlimited

Need Something Specific?

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

- Multiple businesses or entities (more than one LLC, S Corp, or Partnership)
- Additional states (beyond your home state)
- More rental properties or K-1s than included in your package
- Prior year returns (catch-up or amendments)
- Complex cryptocurrency transactions

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