uprise

Tax & Advisory

✓

Year-round support built for business owners

✓

Tax prep AND financial planning under one roof

✓

Strategic tax planning that reduces your bill

What you get

	Essential $240/month Financial planning only (no tax prep)	Premium $300/month Planning + personal tax with Schedule C	Complete $470/month Planning + personal & business entity tax
Financial Planning & Advisory			
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	✓	✓	✓

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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 deduction	—	✓	✓
Self-employed health insurance	—	✓	✓
Retirement contributions (SEP-IRA, Solo 401k, etc.)	—	✓	✓
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.)	—	—	✓

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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	Financial planning	Unlimited	Unlimited
Video calls with your advisor	Unlimited	Unlimited	Unlimited

Need Something Specific?

Most 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.