

# Tax & Advisory



Built specifically for child care 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

	<b>Tax Prep &amp; Filing</b> <b>\$799/year</b> Tax filing only (no advisory)	<b>Tax + Advisory (Home-Based)</b> <b>\$192/month</b> Tax filing + advisory for home-based providers	<b>Tax + Advisory (Centers)</b> <b>\$358/month</b> Tax filing + advisory for child care centers
<b>Tax Returns Included</b>			
Personal tax return - federal & 1 state	✓	✓	✓
Schedule C (sole proprietor/single-member LLC business income)	1 business	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 Deductions for Child Care Businesses</b>			
Home office and time-space percentage deduction	✓	✓	✓
Business vehicle and mileage deduction	✓	✓	✓
Self-employed health insurance	✓	✓	✓

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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.)	—	—	✓
<b>Investments &amp; Property</b>			
Investment income and retirement accounts (1099s, stock options, HSA, Roth conversions)	✓	✓	✓
Cryptocurrency (basic reporting)	✓	✓	✓
Primary home mortgage interest	✓	✓	✓
Rental properties (separate from your child care business)	—	Up to 2	Up to 5
K-1s received (from partnerships, syndications, trusts)	—	Up to 2	Up to 5
<b>Financial Advisory &amp; Planning</b>			
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)	—	✓	✓

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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	—	✓	✓
<b>Communication &amp; Support</b>			
Messaging support	Tax questions	Unlimited	Unlimited
Video calls with your advisor	Annual	Unlimited	Unlimited

### Need Something Specific?

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

- Multiple child care businesses or locations (more than one LLC, S Corp, or Partnership)
- Multiple Schedule Cs (e.g., child care business + consulting or side business)
- Additional states (beyond your home state)
- More than 2 rental properties (Home-Based) / 5 rental properties (Centers)
- 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.