

# TAX SUPPORT PACKAGES



## OUR SUPPORT PACKAGES

PREMIUM      FULL SUPPORT      ESSENTIALS

24/7 access to all tax returns and supporting documents in a secure online vault!	✓	✓	✓
25 minute strategy phone or web meeting to gain a better understanding of your tax return!	✓	✓	✓
Estimated tax vouchers to eliminate tax penalties!	✓	✓	✓
Preparation and electronic filing of your current tax return to get your refund faster!	✓	✓	✓
You are invited to our new financial wellness workshops, hosted monthly.	✓	✓	✓
Maximize insurance savings and coverage through professional insurance reviewer!	✓	✓	✓
You are included in our audit response program!	✓	✓	
Real time tax projection: a mid-year 25 minute web meeting with a tax pro designed to give you answers on your tax liability so you can plan ahead!	✓	✓	
Dedicated tax professional assigned to your file.	✓	✓	
Unlimited email support—tax questions? We're here when you need us!	✓	✓	
Personal financial or business financial coaching. Set goals using meaningful metrics and have an accountability partner.	✓		
Three 25 minute consultations (June, Sept & Dec) to reduce tax liability, understand your options, increase profits, meet goals, etc.!	✓		

**SAVE  
25%**

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PRICE BASED  
ON RETURN  
COMPLEXITY