

# 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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25%**

**PRICE BASED  
ON RETURN  
COMPLEXITY**

## DUE DILIGENCE PACKAGE FOR BUYING A BUSINESS

### Compliance

Are they up to date on all licensing, incorporating documents, and tax reporting?

### Performance

Assessing the profitability based on financials  
Assessing overall business health  
Using metrics to tell a story

### Personnel

How is the compensation structure arranged?  
Are there key employees vital to the business?

### Warning Signs

Over-reliance on certain suppliers or customers?  
Are the books in disarray, and have they been reconciled?

The investment in this service is equal to 0.5% of the business sale price, with a minimum of \$1,250

## BUSINESS STARTUP PACKAGE

### Business Licensing

Help with licensing in the state of WA

### Tax Structure

Choosing the right entity structure  
Laying a foundation for years of success and low taxes

### Insurance

What risk exposure do you have?  
What assets are you protecting?  
Access to dozens of carriers

### Human Capital

When do you hire your first employee?  
What will payroll processing look like?  
How will you attract and retain talent?

### Measuring Performance

We set you up with an accounting system to give you the numbers you need to make good management decisions

### Retirement Planning

How is this business going to help you reach retirement?  
Selecting a retirement plan type

The investment in this service ranges from \$3,000 - \$5,000, depending on expected business size

## COMPREHENSIVE BUSINESS TAX PLANNING

This service includes a tax expert looking through every tax trick in the book to see what fits your circumstances. We take a holistic look at your business and see what tax tricks, loopholes, and incentives can work to your advantage. It includes a tailored report and presentation, and instructions on how to implement the ideas into your business. A few key areas we look at include:

- ▲ Making the best use of entity structures
- ▲ Use of marketing and management companies, and employing family members
- ▲ Using the right retirement plan(s) arrangement
- ▲ Use of insurance programs
- ▲ Maximizing depreciation
- ▲ Taking advantage of real estate tax incentives

The investment in this service averages 8% to 10% of projected first year tax savings, with a minimum of \$1,250