



# 2025 TAX PREP

Basic	Deluxe	Premier	Business
Starting at: <b>\$495</b>	Starting at: <b>\$595</b>	Starting at: <b>\$695</b>	Starting at: <b>\$995</b>
W-2 Wages, Interest, Dividends, Standard Deduction	Itemized Deductions, Investment Income, EIC	Business Income (Sched C), Rental Income, K-1	S-Corp, Partnership, Corporation
W-2, 1099-INT, 1099-R, SSA-1099, 1099-DIV, 1099-G	1099-B, 1098, Charitable Contributions, Crypto	1099-NEC, K-1, Self- employment, Rental Income	1120, 1120-S, 1065

**All packages include:**

Resident State Tax Return

Resident Local Return

Electronic Filing

Estimated Quarterly Tax Vouchers (if applicable)

Unlimited Client Portal Access

Identity Theft Restoration & Services

Protection Plus \$1 Million Tax Audit Defense

**Optional Upgrade:**

**Collaborate Package +\$300**

Includes:

Annual Tax Projection & Advisory Meeting

*Ideal for Peace of Mind &  
Identifying Tax Savings Opportunities*

**Ncrease Package +\$1,500**

Includes:

All things in the Collaborate package  
Seasonal Advisory Meetings & Strategic Tax  
Planning

*Ideal for Business Owners*

Starting price is based on an average amount of time needed to complete your tax returns. There may be additional complexities or other factors that require an above average amount of time to prepare your returns, the actual price may be higher.



## Non Profit Organization Tax Prep

**990-N**

**990-EZ**

**990**

Starting at:

**\$495**

Starting at:

**\$595**

Starting at:

**\$995**

Gross receipts  
under \$50,000

Gross receipts < \$200,000 and  
Total assets < \$500,000

Gross receipts ≥ \$200,000, or  
Total assets ≥ \$500,000

## Additional Services

Dependent Tax Returns

50% off  
tax prep rate

Married Filing Separately

50% off tax prep rate  
for 2nd return

Accounting Services (i.e. write-up/cleanup, preparation of income  
statement)

\$100/hr

Tax Advisory/Consultation

\$300/hr

Monthly Accounting Services

Starting at:  
\$495/month

Express Accounting Services

(for businesses with less than \$250k in revenue, up to 2 bank accounts & 1 credit card)

\$175/month



# CLIENT ACCOUNTING SERVICES

starting at

	Compliance	Collaborate	Increase
<b>Client Accounting Services</b>	<i>monthly rate starting at</i>	<i>monthly rate starting at</i>	<i>monthly rate starting at</i>
<b>Transaction Categorization</b>	\$495	\$695	\$895
<b>Bank &amp; Credit Card Reconciliation</b>	✓	✓	✓
<b>Monthly Financial Reports</b>	✓	✓	✓
<b>Health Check-up &amp; Tax Strategy Calls</b>	Mid-Year	Quarterly	Monthly
<b>Class &amp; Department Tracking</b>	✗	✗	✓
<b>Job &amp; Project Tracking</b>	✗	✗	✓
<b>Commercial Activity Tax Filing</b>	\$75	✓	✓
<b>Sales Tax Filing</b>	\$75	\$50	✓
<b>Business Tax Return</b>	10% Off	20% Off	25% Off
<b>Individual Tax Return</b>	10% Off	20% Off	25% Off



INCREASE FINANCIAL SERVICES

YOUR PARTNER IN INCREASE TO THE NTH DEGREE

# EXPRESS CLIENT ACCOUNTING SERVICES

starting at

Express

*monthly rate  
starting at*

Express Client Accounting Services	\$175
------------------------------------	-------

Available for businesses with revenues less than \$250k/year.

Transaction Categorization	✓
----------------------------	---

Bank & Credit Card Reconciliation (up to 1 checking, 1 savings, & 1 credit card)	✓
---	---

Monthly Financial Reports	✓
---------------------------	---