



TAX OFFICE & ASSOCIATES™

We Make Taxes EZ . . . Because It's Your Money™

1-2-3 EZ TAX PLAN™

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CHOOSE YOUR TAX ANALYSIS

*The Tax Analysis includes a personalized tax plan comparing multiple, complex scenarios using actual current and future tax rates along with a one hour consultation reviewing the information. The review does not include strategic planning.

\$400 BASIC

Ideal for Personal Filing Status
Includes 1 hour consultation

Filing status includes 1040 Only:

- Individual
- Married Filing Jointly
- Married Filing Separately
- Head of Household
- Qualified Widow(er)

Income includes:

- Employment (W2)
- 1099 (MISC, NEC, INT)
- Retirement (SSA, 401K)

\$750 COMPLEX

Ideal for Personal Filing Status with
Schedule C Business Income
Includes 2 hour consultation

Filing status includes 1040 Only:

- Individual
- Married Filing Jointly
- Married Filing Separately
- Head of Household
- Qualified Widow(er)

Income includes:

- Employment (W2)
- 1099 (MISC, NEC, INT)
- Retirement (SSA, 401K)
- Small Business and/or Single Member LLC Income

\$1,200 BUSINESS

Ideal for Corporate or other Entity Filing
Status
Includes 2 hour consultation

Filing status includes:

- Corporate
- Partnership
- Estates and Trusts
- Fiduciary
- Exempt Organizations

Income includes:

Net business revenues

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ADD STRATEGIC PLANNING

*Strategic Tax Planning includes an extended consultation along with tax-minimizing strategies tailored to each client's specific situation, current and future tax savings, as well as retirement contributions. You will also receive tax tips, compliance tips, and a social security information, as well as information on how to reduce liability, the chances of triggering an audit, and red flagging amounts that exceed national averages.

\$100 BASIC

Includes 1 hour consultation

\$300 COMPLEX

Includes 2 hour consultation

\$500 BUSINESS

Includes 3 hour consultation

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OPTIONAL MONITORING AND COMPLIANCE

*All Monitoring and Compliance packages are paid in advance either monthly, quarterly, or annually and include quarterly Income and Expense review, Quarterly and Annual returns.

SOLE PROPRIETORSHIP & SINGLE OWNER LLC

PASS-THROUGH ENTITY	MONTHLY	QUARTERLY	ANNUALLY
Starter – Revenue of \$0 - \$50K	\$50	\$150	\$600
Basic – Revenue of \$50 - \$125K	\$90	\$180	\$1,080
Pro – Revenue of \$125 - \$250K	\$130	\$390	\$1,560
Elite – Revenue of \$250 - \$400K	\$170	\$510	\$2,040

S-CORP

CORPORATION REQUIRED	MONTHLY	QUARTERLY	ANNUALLY
Starter – Revenue of \$0 - \$50K	\$75	\$225	\$900
Basic – Revenue of \$50 - \$125K	\$125	\$375	\$1,500
Pro – Revenue of \$125 - \$250K	\$175	\$525	\$2,100
Elite – Revenue of \$250 - \$400K	\$225	\$675	\$2,700

PARTNERSHIP

2+ OWNERS / MULTI-MEMBER LLC	MONTHLY	QUARTERLY	ANNUALLY
Starter – Revenue of \$0 - \$50K	\$75	\$225	\$900
Basic – Revenue of \$50 - \$125K	\$125	\$375	\$1,500
Pro – Revenue of \$125 - \$250K	\$175	\$525	\$2,100
Elite – Revenue of \$250 - \$400K	\$225	\$675	\$2,700