



TAX OFFICE & ASSOCIATES™

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

1-2-3 EZ TAX APPROACH™

1

LEADING THE WAY

Tax Office & Associates™ is leading the way by putting the personal tax professional back into the retail tax services industry. Our innovative, proprietary 1-2-3 EZ Tax Approach™ takes the stress and anxiety out of taxes. Our fees and services are transparent and affordable. Pick your service and pick your price. We make tax planning, tax preparation, and tax resolution EZ to understand and EZ to afford.

2

OUR PROMISE

We believe every taxpayer deserves the right to have their very own tax professional. Our team of independent tax professionals provides clients with a personalized point of contact and develops personal relationships to build value, while providing an EZ and standardized approach to taxation. All of our products and services are presented in an easy to understand 1-2-3 EZ format. Our services are always transparent and we never hide fees. But it is our personal touch and promise to always think of others first, to always go the extra mile, and to always be excellent that makes the real difference.

3

INNOVATION . . . NOT ALLOCATION

Often times it's difficult to argue with convenience. But convenience for convenience sake may not be in the best interest of you the taxpayer. For example, cashiers at supermarkets are replaced with self-service kiosks. The result from a labor point of view is socially disastrous. Workers are replaced by machines and the business' cost of labor is retained for profits, while the liabilities of a workforce are displaced on the customer who now performs unpaid labor or services on behalf of the supermarket all in the name of convenience and arguably to keep food costs down.

In the tax profession, the industry shift to online programs encourages taxpayers to do their taxes in the name of savings and convenience. This incorrectly assumes that hiring a tax professional is too expensive and that taxpayers know how to properly characterize their income and expenses for tax purposes. Meanwhile, wealthier taxpayers continue to use the personal services of a tax professional. Go figure?

Let us be clear. Taxes remain a personal obligation. Sure, a program can do a simple tax return. It can even do a complex tax return. But it is only as good as the person operating the system. A machine cannot plan a trajectory for a more complex tax return that is the result of helping and guiding the client and their family towards being in a better financial position through thoughtful consideration of the client's goals. Software, whether on your computer or online, is only as good as the information you input. As other retail tax services companies move the tax services profession to automated online programs or worse underpay their tax preparers to match the cost of a machine, they transfer the labor of tax professionals to their customers disguised as innovation, but it is really just allocation.

Don't leave money on the table just to avoid the upfront cost of a tax professional. The cost of paying too much tax outweighs any proposed savings by using a machine. At Tax Office & Associates™, we believe in the human touch . . . we believe in the professional . . . we believe you deserve better.

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