

## Explanation of Service Offerings:

**Choose the Level of Service that best fits your needs:**

Up front fixed fees before we start work, so there are no surprises, only great outcomes.	Premium Tax	Enhanced Tax -With Estimates	Enhanced Tax	Essential Tax
Annual portal	✓	✓	✓	
Telephone or email tax\ situational questions	✓	limited	limited	
IRS or State tax notice reviews	✓	limited	limited	
Electronic filing of tax return	✓	✓	✓	✓
Provision of tax return worksheets	✓	✓	✓	✓
Missing document request	✓	✓	✓	limited
Document review telephone conference	✓	✓	✓	
Tax Liability Exit appointment	✓	✓	✓	✓
Review & excel preparation for stock sales	✓	cost basis provided	cost basis provided	additional fee
Review & excel preparation for required State tax adjustments	✓	exemption % provided	exemption % provided	additional fee
Salary\Bonus withholding review & recommendation	✓	✓		additional fee
Salary\Bonus withholding review - recalculation	✓			
Preparation of tax estimates- at exit appointment	✓	✓		
Provision of estimate payment recalculation	✓			
Pretax planning	✓			
Advisory appointment for-Home Purchase\Sale -Career Change-Retirement-College Planning	✓			
Gift tax planning discussion & return preparation	✓			

**Premium -** The tax return process that you have experienced for the last several years including:

- review of submitted documents with email follow up after initial review
- tax document review and follow up
- preparation of cost basis analysis for stock sales including assistance in obtaining unlisted basis information.
- preparation of analysis for state exempt interest adjustment including assistance in obtaining unsupplied information
- review and recommendations regarding tax withholding including necessary recalculations
- exit appointment to review your tax results
- support for all notices – review and recommendations as needed
- tax planning
- secure portal
- Efiled tax returns

**Premium with Estimates:**

- review, recommendations and preparation of tax estimates- quarterly reviews and updates as needed
- bonus income review, recommendations and preparation of withholding amounts as needed

**Enhanced –** The tax return process that you have experienced for the last several years including:

- review of submitted documents with follow up for missing information after initial review
- tax document review appointment
- preparation of cost basis analysis for stock sales
- preparation of analysis for state exempt interest adjustment
- review and recommendation regarding tax withholding
- exit appointment to review your tax results
- secure portal
- Efiled tax returns

**Enhanced with Estimates:**

- review, recommendations and preparation of tax estimates
- bonus income review, recommendations and preparation of withholding amounts

**Essential** – The tax return process that you have experienced for the last several years including:

- review of submitted documents
- follow up for missing information after initial review
- exit appointment to review your tax results
- Efiled tax returns