

Gold Maintenance Package

THE "GOLD" MAINTENANCE PACKAGE IS OUR MOST COMPREHENSIVE SERVICE, DESIGNED FOR MORE MATURE ORGANIZATIONS LOOKING FOR ONGOING HELP WITH BUSINESS BOOKS AND RECORDS. YOU'LL ENJOY THESE ONGOING SERVICES:



- **Business Tax Preparation.** We'll prepare your business tax return (proprietorship, partnership, or corporation). Additional entities may incur an additional charge.
- **Personal Tax Preparation.** We'll prepare your federal, state, and local personal tax returns.
- **6 Phone Consultations.** You can schedule six phone consultations at your convenience throughout the year, to address breaking issues and opportunities throughout the year.
- **Unlimited Email Consultations.** You can email an unlimited number of questions at your convenience for written responses.
- **Tax Alerts.** You'll get our monthly newsletter email alerts with timely tips for making the most of your money.
- **Due Date Monitoring.** You'll get our Due Date Monitoring service to ensure you never miss an important tax deadline again.
- **Quarterly Virtual Meetings.** You'll get quarterly virtual meetings to review your tax picture. We'll update you with everything you need to know about deductions you can take, anticipating tax roadblocks and opportunities, avoiding IRS audits, and maintaining your personal tax plan based on your changing personal circumstances.
 - **Quarterly One-on-One Financial Reviews.** Your quarterly virtual meetings also include a comprehensive financial statement review. Together, we'll walk step-by-step through your financial statements. We'll show you what the numbers mean, and how you can use them to make smarter business decisions.
 - **Open Questions.** Your quarterly virtual review includes an open Q&A periods.
 - **Quarterly Financial Performance Reviews.** Finally, the Gold Package Includes Quarterly Financial Performance Reviews. These are plain-English translations of your business financial statement, where we identify your individual strengths and weaknesses. The Review comes with a detailed comparison to your competitors.
 - **Quarterly Profit Assessment.** Quarterly Profit Reviews Virtual Meeting. These are evaluations of your profit performance and percentage adjustments if necessary. Signing the Engagement Letter you are in agreement to set up quarterly meetings to ensure that we stay aligned with your financial aspirations and provide the best possible support.
- **Fall Tax Planning Review.** We'll develop a detailed year-end tax projection, along with a detailed tax-strategy plan to minimize your tax liability, & a calculation of estimated tax payments so you don't get caught short on April 15.