

# Silver Maintenance Package

THE "SILVER" MAINTENANCE PACKAGE IS DESIGNED FOR NEW BUSINESS OWNERS AND INVESTORS WHO WANT A STRONG TAX FOUNDATION. YOU GET THESE ONGOING SERVICES:



- **Business Tax Preparation.** We'll prepare your primary business entity 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.
- **Phone Consultations.** You can schedule **three** phone consultations, at your convenience throughout the year, to address breaking issues and opportunities throughout the year.
- **Email Consultations.** You can email up to **three** specific 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.
- **Year-End Virtual Meeting.** You'll get a year-end virtual meeting 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.
- **Open Questions.** Finally, your year-end virtual meeting includes an open Q&A period. This is your chance to ask us any questions about
  - Financing
  - Business Valuation
  - Insurance Needs
  - Lease/Buy Analysis
  - Business Structure (C-Corp, S-Corp, LLC, Partnership, Sole Prop)
  - Personal Financial Planning
  - Retirement Planning
  - Estate Planning
- **Quarterly Assessment.** Quarterly Profit Reviews Virtual Meeting. These are evaluations of your profit performance and percentage adjustments if necessary.

You'll take advantage of ProActive Tax Strategies that most accountants miss to minimize your taxes. (This alone will pay for our service!) You'll sleep well knowing we're doing everything to prevent audits. And you'll have access to a trusted business advisor to answer pressing financial questions.