

Tax Reduction Packages

Value Adding, All-Inclusive Monthly Packages for Immediate ROI!

*Our Goal is not to be the Cheapest.
Our Goal is to be the Best!*

	VIP Package	STANDARD Package	STAND ALONE TAX PLANNING (Non Recurring)
1-Time Fee on Acceptance To Cover Foundational Strategy Sessions (See detailed inclusions below)	Starts at \$1,500	Starts at \$750	N/A
Monthly Fee (Custom Quoted) starts at	Starts at \$1,000 /mo	Starts at \$500 /mo	One-time only at \$5,000
Tax Projections & Tax Plan Strategies Update	Year-Round	Quarterly	One time
Business Federal & State Tax Returns	✓	✓	
Personal Federal & State Tax Returns	✓		
Estimated Quarterly Taxes/Due Dates Reminder (Safe Harbor estimates based on previous year provided for Standard package)	✓	✓	
Optimal Officer Compensation Study & Supporting Documents for the Audit	✓	✓	✓
Unlimited Support with Dedicated Professional	✓	✓	(4) Zoom Meetings with Tax Plan
Monthly Zoom Q&A Sessions	✓	✓	✓
Tax Planner Web Portal for Tax Projection & Planning Modules	✓		
Year End Tax Planning Guide	✓	✓	
Ongoing Tax Reduction Tips & Strategies Spotlight	✓	✓	✓
Video & Screen Cast Communication/ Prioritized Communication System	✓	✓	✓
24/7 Cloud To Gather, Organize, and Sign Tax Docs	✓	✓	✓
Access to the Financial Advisor	✓	✓	✓
Collaboration with client's Financial Advisor and Estate Planning Advisor	✓		

**We Schedule Two – Three Initial Strategy Sessions to put strong foundation together.
Topics include:**

- Tax Strategies
- Owner Compensation Analysis
- Deduction Finder
- Financial Planning Review
- Record Keeping System
- Tax Protection
- Entity Analysis
- Financial Statement Review
- Review of prior of year tax return

ADD ONS

Bookkeeping – Starts at additional \$350 /mo | Amended Returns & Back work – Quoted

A Complimentary Initial Strategy Call with our Tax Manager will Help you select the right custom Service Bundle!



Custom Accounting CPA
Certified Public Accountant & Business Advisor

Scott White
Business Development Manager

(646) 661-2010
scott@customaccountingcpa.com