

Master Handout: Service Comparison Chart

Service	Individuals		Business		
	1040 Tax Prep	1040 Advisory	Business Tax Prep	Business Advisory (Base)	Business Advisory (Advanced)
Tax Planning and Preparation					
Individual Tax Return Prep (Form 1040)	✓	✓	✓	✓	✓
Business Entity Tax Return Prep (Form 1120S, 1065, 1120)			✓	✓	✓
Proactive Tax Planning	Add-On	✓		✓	✓
Tax Projection Worksheets	Add-On	✓		✓	✓
Small Business Tax Deductions and Optimization		✓		✓	✓
Section 199A QBI Deduction Tax and Salary Optimization		✓	✓	✓	✓
Tax Resolution (respond to notices)		✓	✓	✓	✓
Complimentary Quick chats		✓	✓	✓	✓
Payroll and Accounting Services					
Reasonable Shareholder Salary Calc				✓	✓
Monthly shareholder Payroll Processing				Add-On	✓
Annual Payroll Processing (W2s and 1099s)				Add-On	✓
Accounting Services (bookkeeping + analysis)		Add-On	Add-On	Add-On	Add-On
Business Advisory Services					
Fractional Controller (monitoring 3rd Party bookkeeping)				Add-On	✓
Quarterly Financial Statement Analysis				Add-On	✓
Budgeting, Cash Flow analysis, Goal setting					✓
Periodic Business Reviews					✓
Complimentary Quick Chats		✓	✓	✓	✓
Interfacing with Lenders, Attorneys, Financial Planners					✓
Succession Planning, Ownership Changes					✓
Strategic Planning					✓
Fee	\$575	\$1,800+	\$3,360+	\$4,980+	Custom