

COUNTING HOUSE TECHNICS LLC



608 W 10th St Cordell, OK 73632

(580) 275-2873

July 12, 2023

Tax/Accounting Clients:

This year we will begin offering a new type of service to our business clients as a value-added package. Instead of paying for your tax return and accounting every year, plus hourly rates, this package will include those costs.

Full-Service Package - \$500/month with automatic invoicing or \$5000/year (if paid in advance, \$1000 savings for the year!)

What you get:

- Complete Business Tax Return
- Full Accounting for the entire year
- 5 hours of Business Consultations per year (15 minute minimum)
- Financial Health Evaluation
- Cash Flow Management
- Business Document Retention & Storage; length dependent on IRS regulations.
- Business Budgeting Forecast
- Financial Statement

Intermediate-Service Package - \$400/month with automatic invoicing or \$4500/year (if paid in advance, \$300 savings for the year!)

What you get:

- Complete Business Tax Return
- Full Accounting for the entire year
- 2 hours of Business Consultations per year (15 minute minimum)
- Cash Flow Management
- Business Document Retention & Storage; length dependent on IRS regulations.
- Financial Statement

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Basic-Service Package - \$300/month with automatic invoicing or \$3500/year (if paid in advance, \$100 savings for the year!)

What you get:

- Complete Business Tax Return
- Full Accounting for the entire year
- ½ hour of Business Consultations per year (15 minute minimum)
- Business Document Retention & Storage (digital ONLY); length dependent on IRS regulations.

For those who opt out of our packages, traditional accounting is charged at \$100/month for one bank account and one additional banking/credit card account. Additional banking/CC accounts will result in additional charges in increments of \$25/month. Tax returns are still charged by form and are subject to change based on IRS regulations. Consulting and ANY other service requested is charged at our hourly rate of \$150 (1-hour minimum charge).

If you are interested in any of our Value-Added Services, please fill out the form on the following page and return it to our office via email to denise@chttax.com, by fax to 580-207-6010, by text to 580-374-3751 or via your Secure Client Portal.

Respectfully,

Denise Danks
Counting House Technics, LLC
580-275-2873 (office)
580-207-6010 (fax)
denise@chttax.com

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I/we _____ (business name) are interested in the following

Value-Added Services provided by your office (check only ONE).

Full-Service Package

Intermediate-Service Package

Basic-Service Package

I/we wish to be billed:

Monthly

Annually

I/we understand that by submitting this form, a contract will be created and sent to me/us for signature, along with an invoice for services requested. I/we further agree that the contract will be signed upon receipt and the invoice will be paid immediately. Services will not begin nor be deemed to be in effect until both conditions are met.

Authorized Signature

Printed Name

Date