

Choose the level of support that fits your tax life.

One predictable monthly fee combines annual tax return preparation with proactive planning, year-round CPA access, and help when tax questions arise - not just during filing season.

ESSENTIAL	MOST POPULAR ADVANCED	SELF-EMPLOYED / RENTAL
\$89 / month	\$129 / month	\$179 / month
For straightforward individual returns	For higher-income professionals & investors	For sole proprietors & rental owners
✓ Annual federal + 1 state individual tax return ✓ W-2, retirement, interest/dividends & itemized deductions ✓ 1 annual tax-planning review ✓ Withholding review ✓ Year-round tax questions via secure messaging ✓ IRS/state notice assistance for qualifying notices ✓ Secure client portal	✓ Everything in Essential ✓ Investment, capital-gain & K-1 reporting ✓ Quarterly tax-strategy check-ins ✓ Estimated-tax + withholding projections ✓ Planning for bonuses, equity compensation & retirement decisions ✓ Expanded year-round advisory support ✓ Priority response during tax season	✓ Everything in Advanced ✓ Includes 1 Schedule C OR 1 rental property (Schedule E) ✓ Self-employment / rental tax planning ✓ Quarterly estimated-tax guidance ✓ Deduction & depreciation review ✓ Year-round strategy for tax-sensitive decisions ✓ Additional activities quoted separately

Billed monthly under a 12-month membership agreement

Annual tax return preparation is included as part of the membership - not billed separately.

Every membership includes

- ☐ Annual tax return preparation
- ☐ Proactive tax planning
- ☐ Year-round CPA access
- ☐ IRS notice assistance
- ☐ Secure client portal

Membership scope & important details

- Memberships are designed for individual clients. S corporations, partnerships, bookkeeping, payroll, and standalone business compliance are not included.
- Additional states, amended or prior-year returns, multiple Schedule C/E activities, audit representation, extensive research, and other out-of-scope work are quoted separately.
- Membership payments continue after filing under the 12-month agreement. Early termination is subject to the terms of the membership agreement.

Ready for a more proactive tax experience?

Year-round CPA guidance with predictable monthly pricing.

BECOME A MEMBER