

Tax preparation is just the beginning.

Smallwood CPA & Tax Advisory provides individuals and families with accurate tax preparation, proactive planning, and year-round CPA support. Our goal is to help you understand your tax situation before important decisions are made - not just at filing time.

01 Tax Preparation

Federal and state individual income tax return preparation, including common schedules for investments, rentals, self-employment, and itemized deductions.

02 Proactive Tax Planning

Tax projections, withholding and estimated-tax reviews, and planning designed to identify opportunities before year-end and reduce surprises at filing time.

03 Year-Round CPA Support

A CPA relationship that continues beyond tax season for questions involving job changes, investments, retirement decisions, major purchases, and other tax-sensitive events.

04 IRS Notice Assistance

Review and guidance for qualifying IRS or state tax notices. Matters requiring representation, extensive research, or work outside your membership scope may be quoted separately.

Designed for individuals who want more than a once-a-year tax return

Individuals & Families

Straightforward annual compliance with a relationship you can rely on.

Higher-Income Professionals

Planning around withholding, bonuses, investments, and other income changes.

Investors & Rental Owners

Support for capital gains, investment income, and rental-property reporting.

Self-Employed Individuals

Tax preparation and planning for sole proprietors and independent professionals.

Simple membership pricing - shown separately

We recommend keeping this Services Guide focused on what we do rather than listing per-form or hourly prices. Our primary individual tax services are offered through membership options, with pricing and plan details presented on the Memberships page. Work outside a membership scope is quoted in advance based on complexity.

View membership options and choose the level of support that fits your needs.

smallwoodcpatax.com | **Select "Memberships"**

Smallwood CPA & Tax Advisory | Charles Town, West Virginia