



Pricing Schedule-Effective 1/1/2025

Financial Advising & Management Services

Financial Advisory Services

-Initial 30- minute consultation-\$49.99

-Basic Advisory/Hourly rate \$99.99 per session

- Client Discovery & On-boarding
- Goal setting
- Ala Carte planning-choose *ONE* focus
 - Retirement Planning
 - College Funding
 - Debt Reduction & Elimination
 - Business Planning & Funding
 - Estate Planning

-Premium Advisory-Two 1-hour appointments monthly (\$149.99 monthly)

- Client Discovery & On-boarding
- Goal setting
- Basic financial plan (includes two focuses)
- Quarterly client review (1 hours)

-Platinum Advisory-Three 1-hour appointments monthly (\$279.99 monthly)

- Client Discovery & On-boarding
- Goal setting
- Comprehensive plan (includes all five focuses and specialty focuses)
- Quarterly client review and plan update (2 hours)
- Bookkeeping service provided by Quickbooks (if applicable)

-Money Management services are 2% of AUM-minimum \$25,000



Accounting & Bookkeeping Services

Initial 30-minute consultation-\$49.99

-Small Business Package (\$1,799.88 annual/\$149.99 monthly)

- Client Setup and On-boarding with Quick Books or Xero (client access via App)
- Monthly monitoring including expense retrieval (bi-weekly reconciliation)
- Monthly financial reporting (Profit & Loss and Cash Flow statements)
- Quarterly strategic planning client reviews
- Monthly Basic Financial Planning Services

-Growing Business Package (\$3,359.88 annual/\$279.99 monthly)

- Client Setup and On-boarding with Quick Books or Xero (client access via App)
- Monthly monitoring including expense retrieval (bi-weekly reconciliation)
- Monthly financial reporting (Profit & Loss and Cash Flow statements)
- Quarterly strategic planning client reviews
- Monthly Basic Financial Planning Services

Payroll Services add-on (\$85 monthly/\$1,020 annual)

- Weekly/Bi-Weekly
- Paper/Direct Deposit
- Quarterly Tax reporting
- W-2/1099 preparation and filing
- Workers Comp, Unemployment Compensation coverage

Tax Preparation Services

Individual Tax Return (1040's)

- Federal & State \$199.99 Basic Return
- 1040 with schedule C or other business returns (1065)-\$259.99;
- each additional schedule C \$69.99

Corporate Tax Return (1120)

- Varies on type of entity
- \$399.99 to \$999.99

Non-profit Tax Return (990's)

- eligible for 990 EZ (\$29.99-\$49.99)
- price varies; starting at \$399.99 to \$499.99



Business Formation and Planning Services

Corporate Filing

(Filing fee-\$150.00 + State Fees-amount per state varies)

- State LLC, Corporation electronic filing
- EIN acquisition
- Corporate bylaws or Operating Agreement template
- Assistance with obtaining DUNS number

Estate Formation and Planning Services

-Comprehensive Estate Planning-\$1695.00

- Revocable Living Trust with unlimited revisions
- Pour-over will
- Durable Power of Attorney's (Financial & Health)
- Advance Health Directives
- Complimentary Comprehensive Financial Planning Services

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