

# TAX PREPERATION APPLICATION



**KANDS CONSULTATIONS**

Name: \_\_\_\_\_

Email : \_\_\_\_\_

Phone: \_\_\_\_\_ D.O.B: \_\_\_\_\_

SSN: \_\_\_\_\_ % of ownership: \_\_\_\_\_

Business Name: \_\_\_\_\_ Tax ID# : \_\_\_\_\_

Business Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Business Start Date: \_\_\_\_\_ Legal Entity Type:  LLC  S-Corp  C-Corp  Sole Proprietorship

## Please choose one package

This Package for LLCs and Corporations Includes:

Quartley appointments for consulting & advising with a dedicated CPA that specializes in corporate/business taxes. This is a chance to wade through questions and to keep the business owner on track with our tax strategies. Personalized tax plan based on the business and type of entity. We show the business owner which deductions are allowed, best tax-deferred retirement plans, and much more. Designed to optimize taxes for the business owner. First year of tax preparation is included for both the business and personal return (Includes joint personal return if it applies) Review of previous year's taxes to check for maximum savings. All financial statements including P&L, balance sheet, debt schedule, etc. \$3,785 after your free consultation call!

This Package for LLCs and Corporations Includes:

The first year of tax preparation is included for both the business and personal returns. Also includes joint personal return if it applies. Review of previous year's taxes to check for maximum savings. One, tax consulting and planning appointment with one of our on-staff CPA. \$2,495 after your free consultation call!

This Package for Sole Proprietors Includes:

First year of your taxes for both the business and personal returns. Review of previous year's taxes to check for missing deductions and maximum savings. Four, quarterly appointments with your appointed CPA to wade through questions and to keep the business owner on track with our tax strategies. \$1,795 after your free consultation call!

## Payment Information

Account Type:  Savings  Checking

Name on Acct. : \_\_\_\_\_

Bank Name : \_\_\_\_\_

Account # : \_\_\_\_\_

Routing # : \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_