

TAX PACKAGE OFFERINGS	ELITE Concierge Tax Planning & Compliance	PRO Tax Compliance w/ Quarterly Analysis	BASIC Year End Tax Compliance Only
Personalized Strategic Tax Planning	Full	Limited	X
IRS Audit Representation	Full	X	X
Tax Meetings/Estimates	Unlimited	Quarterly	Annual
Support Level	Unlimited	Phone & email	Email only
Email updates on current tax topics throughout the year	Upon IRS or state release	Quarterly	Yearly
Meetings/Communication with Julie	Any Time, sched in advance	Quarterly	X
Frequency of Tax Strategies Reviewed	Monthly	Quarterly	X
Amended Returns & Backwork	Quoted in onboarding	X	X
QBO Accounting Package	Quoted in onboarding	X	X
Qtrly Estimated Tax Payment Report w/pymts made	✓	X	X
Cloud Storage	✓	✓	✓
Federal & State Tax Returns	✓	✓	✓
Year-End Tax Planning Guide	✓	✓	X
VIP Same Day Access to Concierge Team	✓	X	X
Pickup/Delivery Service	✓	X	X
IRS & State Notices	✓	X	X
IRS Audit Representation	✓	X	X
Annual Pre-Payment Discount	5%	X	X



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