



OUR SERVICES AT A GLANCE

One Team. One Strategy. Your Entire Financial Picture.

Clear starting prices and a concise view of what is included in each Piece of Wealth Planning service.

MOST COMPREHENSIVE					
WHAT'S INCLUDED	ACCOUNTING & FINANCIAL PLANNING BUNDLE	ACCOUNTING & TAX ADVISORY	FINANCIAL PLANNING & WEALTH MANAGEMENT	TAX PLANNING & PREPARATION	SMALL BUSINESS CONSULTING
	Starting at \$1,000 / month	Starting at \$650 / month	Starting at \$500 / month	Starting at \$4,800 / year Paid monthly	Starting at \$1,000 / project
Monthly Bookkeeping	✓	✓	—	—	—
Financial Reports & Business Insights	✓	✓	—	—	—
Payroll Coordination & Support	✓	✓	—	—	—
Tax Preparation (Business & Individual)	✓	✓	✓	✓	—
Tax Planning & Strategy	✓	✓	✓	✓	—
Tax Projections & Estimated Taxes	Quarterly	Quarterly	As needed	Quarterly	—
Tax Notice & Correspondence Support*	✓	✓	✓	✓	—
S Corp Analysis & Planning	✓	✓	—	✓	By project
Comprehensive Financial Planning	✓	—	✓	—	—
Investment Management & Planning	✓	—	✓	—	—
Retirement, Insurance & Estate Planning	✓	—	✓	—	—
Ongoing Meetings & Support	Quarterly	Quarterly	Quarterly	Semi-annually	Project-based
One-Time Business Consulting	—	—	—	—	✓

BUNDLE NOTE

Accounting & Tax Advisory and Financial Planning & Wealth Management can be bundled for a more comprehensive business + personal financial planning relationship.

TAX NOTICE & CORRESPONDENCE SUPPORT

Included for notices related to returns/services we prepare. Audits, amended returns, representation, or complex matters may require a separate engagement and fee.