

## Individuals & Families (starting at)

Package	Best for	Price
Starter - Single	W-2, standard deduction	\$149 (Grand Opening: \$99)
Starter - Married Filing Jointly	Up to 2 W-2s, standard deduction	\$199 (Grand Opening: \$149)
Plus	Itemized / mortgage/charity, child/education credits, interest/dividends, and a few brokerage sales)	\$299
Self-Employed / Multi-State	1099/Schedule C or multiple states	\$499
Complex / Cross-Border	Advanced reporting / international situations	\$799+

<b>Common add-ons</b> <ul style="list-style-type: none"> <li>• Additional state: \$75 each</li> <li>• Schedule C (1099/self-employed): from \$150</li> <li>• Rental (Schedule E): from \$200</li> <li>• Investments / 1099-B: from \$100</li> <li>• IRS notice support: from \$150</li> </ul>	<b>Discounts</b> <ul style="list-style-type: none"> <li>• Early-bird: 10% off (intake completed before Mar 1)</li> <li>• Referral credit: \$25 for you + \$25 for your referral</li> <li>• Bundle: ask about multi-year (prior) and family bundles</li> </ul>
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## Small Business Owners (monthly packages - starting at)

**Premium includes:** annual business tax return + (1) owner individual return (Form 1040). Owner return includes Federal + 1 state. Additional states/complex schedules billed separately.

Services	Starter	Growth	Premium
Monthly bookkeeping + reconciliation	✓	✓	✓
Monthly P&L + Balance Sheet	✓	✓	✓
Sales tax support	—	✓	✓
Payroll processing	Add-on	✓	✓
Quarterly estimated taxes support	✓	✓	✓
Annual business tax return	Add-on	✓	✓
Owner individual return (1040 - 1 owner)	Add-on	Discounted add-on	✓
Tax planning sessions	1 / year	2 / year	Quarterly
CFO / strategy calls	—	1 / month	2 / month
IRS notice support	Basic	✓	Priority
<b>Price (starting at / month)</b>	<b>\$399</b>	<b>\$799</b>	<b>\$1,499</b>

**Business discounts:** 10% bundle discount (bookkeeping + payroll + tax) • 15% annual prepay (12 months) • New client promo: \$150 off first month (Growth/Premium) or \$75 off (Starter).

Notes: Pricing depends on monthly transaction volume, number of employees, and number of states. Final quotes provided after a quick scope call.