



## A La Carte Menu

### Tax Services

#### Individual Tax Preparation

- ▲ Additional Schedule C's and F's
- ▲ Schedule E for 1-3 Properties
- ▲ Schedule E for additional properties
- ▲ Sale of properties, casualty losses, numerous Schedule D transactions, and other forms and schedules will be billed separately.
- ▲ Personal returns of multiple owners receive a discount on all fees related to the personal return for each return.

#### Business Tax Entity Preparation

##### Sales Tax Return

- ▲ Per State
- ▲ Per City

##### Property Tax Return

- ▲ Per Entity

### Tax Planning

#### Personalized Proactive Tax Strategy

The process starts with your personalized proactive tax strategy. Here's how it works:

- You start with a brief interview with a Client Consultant. We want to hear about where you are now, and where you want to be. We'll ask a few easy questions about your current situation and from that determine the best Proactive Tax Strategy program for you.
- You'll complete our brief Tax Questionnaire. This is where you tell us your financial, business and investment goals and where your money goes. We'll need copies of your past three years of tax returns and a little information on each business entity ( S Corporation, LLC, Limited Partnership, etc.) that you currently have set up. It's all in the Tax Questionnaire and we're here to help you if you have more questions. The more information you give us, the better job we'll do.
- Your personal Tax Strategist reviews your information and develops a comprehensive Proactive Tax Strategy. This process typically takes two weeks so we can research your best possible options. This is the stage where the cool things

happen! In fact, the average savings for a taxpayer as a result of their Tax Strategy is over \$14,000 per year!

- You'll talk with your personal Tax Strategist to review the details of your plan and to get your feedback. Typically, this will last about two hours. It's so packed with information, though, that we write up your customized strategy so you won't miss a thing!
- You get a written strategy plan, along with information on all available deductions, credits, loopholes, and strategies.
- About two weeks after the initial consultation, we will follow up with a phone call from your Strategist to cover the details of the first meeting again or to go through any new questions you've uncovered.

### **Beginning Stage Strategy**

This stage is designed for real estate investors and business owners who do not own multiple properties or run multiple businesses. You are just beginning, or just thinking about beginning, your business or real estate investing. Your goals are:

- ⦿ Saving money
- ⦿ Creating after-tax cash to help fund your real estate investments
- ⦿ Monitoring your Blended Tax Rate ( total tax paid divided by total taxable income)

At the Beginning Stage your Certified Tax Coach will help you

- ★ Keep good records and understand Financial Statements
- ★ Build your financial awareness
- ★ Create and stick to budgets for your investments
- ★ Make the transition from employee to business owner to discover your own tax advantages

### **Middle Stage Strategy**

This stage is for business owners who have a fairly straightforward business and/or are just venturing out into real estate investing. The Middle Stage covers the widest range, depending on how long you've been going and how much your business and/or investments have grown.

In a Middle Stage Strategy, your Certified Tax Coach will help you

- ★ Save with pre-tax money
- ★ Invest with pre-tax money
- ★ Find legal income tax loopholes to increase your take home income
- ★ Plan for alternative minimum tax (AMT) as your income grows
- ★ Identify and get rid of non or under-performing investments
- ★ Identify upcoming tax law changes and adjust your Proactive Tax Strategy accordingly
- ★ Understand where you have no investment control and how to shift investment strategies to things you can control
- ★ Protect your growing wealth and asset base with proper business structures and other asset protection measures.

Your Certified Tax Coach is also going to help you plan for the move to the Advanced Stage – a place where you create wealth from your assets rather than your earned income, and reduce your overall effective tax rate.

## Advanced Stage Strategy

This is for business owners who have multiple businesses and/or real estate investors with more than 2 properties. You have multiple opportunities for tax planning through structuring how you hold your investments. The Advanced Stage Strategy includes planning on more than one level by looking at each business/real estate investment for opportunities to shift income and lower your tax bracket.

Here's what you and your Certified Tax Coach will be focused on in an Advanced Stage Strategy:

- ★ Increase wealth without increasing tax rate
- ★ Plan for unrealized gains to select the best tax rate
- ★ Pension and Retirement Investing
- ★ Legally circumvent income tax / AMT system
- ★ Establish intelligent financial controls
- ★ Implement strong asset protection features
- ★ Short and long-term focus

### W4 Review

You fax in your latest paystubs, financial statements and other relevant information and we prepare a current tax projection. This allows you to manage your tax liability and/or adjust your withholding or estimated tax payments.

### Personal Review

We review your personal tax strategies, current law changes and update your personal tax projection worksheets providing you with a clear understanding of where you are and if you have been taking advantage of all possible tax saving strategies.

### Small Business Review – Minimizing Your Liability

We review your business financials so that we can provide you with business taxation planning advice before the end of the year. Action taken here will allow us to pro-actively help you plan your wealth creation strategies through a systematic process of legally minimizing your business tax liability.

### Small Business Consultation

Have questions related to tax planning for a small business or deductions available to a small business when preparing your income tax return? Whether you're wondering how long and what records you have to keep for your business, hiring your family, having some fun or about what you can or can't deduct on your income tax returns, this Small Business Consultation will give you the answers.

### Small Business Compensation & Benefits Consultation

Have questions related to how you get paid in your business or pay your personal taxes? Wondering about what benefits you're eligible for and how they work? Whether you're wondering do I take a salary, draw or distribution? How do you deduct your insurance, your home, and your automobile or other tax free benefits? Should you set up an HSA or HRA? Questions regarding what retirement plan should you have, 401(k), SEP or Simple, this Compensation and Benefit Consultation will give you the answers.

**Contact Us to Learn  
More About Our A la  
Carte Tax Services**