



The Tax Office, Inc. offers a full array of comprehensive tax and support services tailored to meet your company's needs. Whether you're an emerging, evolving or established business, you'll find outstanding value for a wide variety of accounting, consulting and strategic-planning services - for a single fee.

We offer three tiers of Business Analysis Packages: **COBALT • AZURE • SAPPHIRE**

Cobalt Package

PERSONAL TAX PREPARATION. We'll prepare one Federal and one State personal tax return. For additional forms see A La Carte schedule for pricing.

PERSONAL AUDIT DEFENSE PROGRAM. We'll represent you in either a correspondence or office audit by any government agency as well as respond to any government notice. Appeals or field audits may require additional fees.

BASIC SUPPORT PLAN. Offers 48 hour response by one of our CPA's, Enrolled Agents, Certified QuickBooks Pro Advisors, Tax Accountants or other professionals

ANNUAL TAX PLANNING REVIEW. You will receive a personalized meeting where we will update you on allowable deductions, strategies for anticipating tax roadblocks and opportunities, avoiding IRS audits and maintaining your personal tax plan based on your changing personal circumstances.

GENERAL LEDGER ACCOUNT ANALYSIS. Annually, we will analyze every general ledger account including income and expenses, bank accounts, fixed assets, liabilities and equity accounts, ensuring your business is always audit-ready. We will highlight any critical issues that need management attention and make sure you are not missing any valuable tax deductions.

ASK US. Your year-end review includes a Q&A session. This is your chance to ask us about:

- Financing
- Business Valuation
- Employee Benefits
- Lease/Buy Analysis
- Retirement Planning
- Estate Planning
- Business Structure (C-Corp., S-Corp., LLC., Partnership, Sole Proprietorship)



We offer three tiers of Business Analysis Packages: **COBALT • AZURE • SAPPHIRE**

Azure Package

BUSINESS TAX PREPARATION. We'll prepare one Federal and One State primary business entity return (Partnership, Corporation, LLC, or LLP). Additional entities prepared will incur additional charges.

PERSONAL TAX PREPARATION. We'll prepare one Federal and one State personal tax return. For additional forms see A La Carte schedule for pricing.

BUSINESS AND PERSONAL AUDIT DEFENSE PROGRAM. We'll represent you in either a correspondence or office audit by any government agency as well as respond to any government notice. Appeals or field audits may require additional fees.

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Sapphire Package

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PERSONAL TAX PREPARATION. We'll prepare one Federal and one State personal tax return. For additional forms see A La Carte schedule for pricing.

BUSINESS AND PERSONAL AUDIT DEFENSE PROGRAM. We'll represent you in either a correspondence or office audit by any government agency as well as respond to any government notice. Appeals or field audits may require additional fees.

PREMIUM SUPPORT PLAN. Offers 24 hour response by one of our CPA's, Enrolled Agents, Certified QuickBooks Pro Advisors, Tax Accountants or other professionals.

SEMI-ANNUAL TAX PLANNING REVIEW. You will receive semi-annual personalized meetings where we will update you on allowable deductions, strategies for anticipating tax roadblocks and opportunities, avoiding IRS audits and maintaining your personal tax plan based on your changing personal circumstances.

SEMI-ANNUAL GENERAL LEDGER ACCOUNT ANALYSIS. Semi-annually, we will analyze every general ledger account including income and expenses, bank accounts, fixed assets, liabilities and equity accounts, ensuring your business is always audit-ready. We will highlight any critical issues that need management attention and make sure you are not missing any valuable tax deductions.

ASK US. Your year-end review includes a Q&A session. This is your chance to ask us about:

- Financing
- Business Valuation
- Employee Benefits
- Lease/Buy Analysis
- Retirement Planning
- Estate Planning
- Business Structure (C-Corp., S-Corp., LLC., Partnership, Sole Proprietorship)



Which Business Analysis Package is Right For You?

See Website For Further Details

BUSINESS PACKAGE COMPARISON			
Services	Cobalt	Azure	Sapphire
Business Entity Tax Preparation		✓	✓
Personal Tax Preparation	✓	✓	✓
Audit Defense Program	✓	✓	✓
Support	48 Hour Response	48 Hour Response	24 Hour Response
Tax Planning Review	Annually	Annually	Semi-Annually
QuickBooks Review	Annually	Annually	Semi-Annually

Fees based on a Fiscal Year (April – March). If starting in any month other than April, see Terms of Agreement for Instructions.

Special Promotion for Qualifying Buyers: \$save on \$setup fees: Call 916-773-7053 to learn about this special promotion.**
