



The Tax Office, Inc. has developed a series of bundled individual tax service packages designed to provide tax preparation planning and support tailored to meet your individual needs. Our three different packages offer better value on an annual basis, and provide you with the services you need all for a single fee.

We offer three tiers of Individual Tax Packages : **BASIC • PREMIUM • ULTRA**

## Basic Package

The “Basic” Individual Tax Package is designed for individuals who desire peace of mind knowing their personal returns will be completed accurately and if any government agency contacts them regarding those returns it will be taken care of. You’ll also have access to a trusted advisor to answer pressing questions. You get these ongoing services:

**PERSONAL TAX PREPARATION:** We’ll prepare one Federal and one State personal tax return.

**AUDIT DEFENSE PROGRAM:** If you receive any government notice regarding your income tax return you will have the safety and security of knowing you are protected by qualified, experienced professionals who will fight your battles with the IRS or State of California. This means that when you get that letter, you just send it to us and we handle it with no additional charges from us. We’ll also represent you in either a correspondence, field or office audit by any government agency with no additional fees except as noted. 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.

Contact Us To  
Learn About Our  
Individual Tax  
Packages



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## Premium Package

The “Premium” Individual Tax Package is designed for individual business clients who desire peace of mind knowing their personal returns will be completed accurately and if any government agency contacts them regarding those returns it will be taken care of. You’ll also have access to a trusted advisor to answer pressing questions.

**PERSONAL TAX PREPARATION:** We’ll prepare one Federal and one State personal tax return.

**AUDIT DEFENSE PROGRAM:** If you receive any government notice regarding your income tax return you will have the safety and security of knowing you are protected by a qualified, experienced professionals who will fight your battles with the IRS or State Agency. This means that when you get that letter, you just send it to us and we handle it with no additional charges from us. We’ll also represent you in either a correspondence, field or office audit by any government agency with no additional fees except as noted. Appeals or field audits may require additional fees.

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

**ANNUAL REVIEWS:** You'll get an annual “sit down” meeting to review your tax picture. We'll update you with everything you need to know about deductions you can take, anticipating tax roadblocks and opportunities, avoiding IRS audits, and maintaining your personal tax plan based on your changing personal circumstances.

**OPEN QUESTIONS:** Your year-end sit-down includes an open Q&A period. This is your chance to ask us any questions about:

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



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## Ultra Package

The “Ultra” Individual Tax Package is designed for individual clients who desire additional planning with the peace of mind knowing their personal returns will be completed accurately and if any government agency contacts them regarding those returns it will be taken care of. You’ll also have access to a trusted advisor to answer pressing questions.

**PERSONAL TAX PREPARATION:** We’ll prepare one Federal and one State personal tax return.

**AUDIT DEFENSE PROGRAM:** If you receive any government notice regarding your income tax return you will have the safety and security of knowing you are protected by a qualified, experienced professionals who will fight your battles with the IRS or State Agency. This means that when you get that letter, you just send it to us and we handle it with no additional charges from us. We’ll also represent you in either a correspondence, field or office audit by any government agency with no additional fees except as noted. Appeals or field audits may require additional fees.

**ULTRA 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 REVIEWS:** You’ll get semi-annual “sit down” meetings to review your tax picture. We’ll update you with everything you need to know about deductions you can take, anticipating tax roadblocks and opportunities, avoiding IRS audits, and maintaining your personal tax plan based on your changing personal circumstances.

**OPEN QUESTIONS:** Your year-end sit-down includes an open Q&A period. This is your chance to ask us any questions about:

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



## Which Individual Tax Package is Right For You?

See Website For Further Details

INDIVIDUAL TAX PACKAGE COMPARISON			
Services	Basic	Premium	Ultra
Individual Tax Preparation	✓	✓	✓
Audit Defense Program	✓	✓	✓
Support	48 Hour Response	48 Hour Response	24 Hour Response
Tax Planning Review		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.

***If Special Promotion for Qualifying Buyers: \$ave on \$etup fees: Call 916-773-7053 to learn about this special promotion".***