



PERSONAL BUNDLE

EASY MONTHLY FEE

Everything you need to reach your goals faster.

1 Personal Tax Preparation & Filing

We expertly prepare & e-file your federal/state tax returns so you can rest easy knowing your taxes are taken care of and you can spend more time on the stuff you enjoy.

2 Secure Digital Tax Data Management

We securely store and manage your tax documents in an encrypted online locker so you can access your past returns and financial documents anytime, from any device.

3 Withholding Analysis

We review your tax withholding to make sure your paycheck is aligned with your other goals and protect against any bad surprises.

4 Missing Tax Deductions Analysis

Tax law changes constantly. We review your historic tax filing compared to the latest tax law and identify areas where you may have missed tax savings. We outline what can be done to capture these savings moving forward so you can have the best possible results in your next filing (if you follow and implement our recommended actions).

5 Year-Round Tax Savings Implementation

We complete a full tax savings analysis based on your unique goals and help you implement a custom tax reduction plan throughout the year. This ensures you're paying the least amount of tax possible based on your specific filing.

6 IRS/State Correspondence Assistance

If you get a notice or letter from the IRS or a local agency, we'll tell you what it means and exactly what needs to be done to address it so you don't have to worry.

7 Personal Cash Flow Analysis & Recommendations

We create, implement, & monitor a custom cash flow plan, based on your financials, so you can know exactly how much you should spend and how to increase your cash left over each month.

8 Personal Net Worth Tracking & Analysis

We review your assets and liabilities so you can track your Personal Net Worth over time. This will help you ensure it's growing in the most tax-efficient way and verify your long-term goals aren't pushed back by paying unnecessary taxes.

9 Personal Threats & Stability Analysis

We complete a threats checklist each year and work with you to neutralize unplanned spending, expenses, or liabilities that could crush your nest egg or long-term goals. If anything happens, our team will work with you to minimize any impact and create an immediate action plan to get back on track toward your goals.

10 Top-3 Priorities Digital Action Plan

We document the Top-3 Priorities that you want to achieve in the next 12 months. We work with you to execute the specific actions that will have the biggest impact on those priorities.

11 Year-Round Advisor Support

Never feel stuck or not know what to focus on. Have an expert you can go to with any questions, & who knows your situation inside and out. Spend your time doing what you do best.



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