



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

We offer three tiers of Business Tax Packages: **TURQUOISE • AQUAMARINE • OPAL**

Turquoise Package

The "Turquoise" Business Tax Package is designed for business clients who desire peace of mind knowing their personal and business 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 those pressing questions. You get these ongoing services:

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. If you receive any government notice regarding your income tax return you will have the safety and security of knowing that you are protected by a qualified, experienced professional 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.

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

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)

**Contact Us to Learn More
About Our Business
Tax Packages**



We offer three tiers of Business Tax Packages: **TURQUOISE • AQUAMARINE • OPAL**

Aquamarine Package

The "Aquamarine" Business Tax Package is designed for business clients who desire peace of mind knowing their personal and business 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 those pressing questions. You get these ongoing services:

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.

PERSONAL AND BUSINESS AUDIT DEFENSE PROGRAM. If you receive any government notice regarding your income tax return you will have the safety and security of knowing that you are protected by a qualified, experienced professional 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.

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 REVIEW. 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 roadblocks and opportunities, avoiding IRS audits, and maintaining your personal tax plan based on your changing personal circumstances.

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 Tax Packages: **TURQUOISE • AQUAMARINE • OPAL**

Opal Package

The "Opal" Business Tax Package is designed for business clients who desire additional planning with the peace of mind knowing their personal and business 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 those pressing questions. You get these ongoing services:

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.

PERSONAL AND BUSINESS AUDIT DEFENSE PROGRAM. If you receive any government notice regarding your income tax return you will have the safety and security of knowing that you are protected by a qualified, experienced professional 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.

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 REVIEW. You'll get a semi-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 roadblocks and opportunities, avoiding IRS audits, and maintaining your personal tax plan based on your changing personal circumstances.

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 Tax Only Package is Right For You?

See Website For Further Details

BUSINESS TAX PACKAGE COMPARISON			
Services	Turquoise	Aquamarine	Opal
Business Entity Tax Preparation		✓	✓
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: \$save on \$setup fees: Call 916-773-7053 to learn about this special promotion".
