

STRATEGIC ADVICE. A BRIGHTER TOMORROW.

Tax Planning & Consulting



ALL PRICING IS SUBJECT TO CHANGE DUE TO CLIENT SERVICE NEEDS.

Introduction to Tax Planning Call

\$200 / hour

Basic Tax Planning

For proactive individuals discussing their financial situation with a tax expert, with no custom summary report or implementation.

\$850–1.5k / once

Advanced Tax Planning

Reviews a single year's projected income and scenarios, with a summarized report, calculations, and recommendations.

\$1.5k–3k / once

Ongoing Tax Planning & Advisory

For complex situations, implements advanced tax-saving strategies. Includes quarterly CPA planning sessions plus projection and strategy updates.

\$4.5k / year

