

# Personal Tax Return Packages

Peace-of-mind, convenience & proactive tax planning advice.



## The Value Guarantee

Our work is guaranteed to the complete delight of the customer. If you are not completely satisfied with the service performed by Bender CPA, we will, at your request, either refund the price or accept a portion of said price that reflects your level of value received.

The service tiers and pricing are *custom* to your tax situation and its complexity.

	Concierge	Premium	Essential
	For customers who have a complex situation or significant changes from their prior year tax return	For customers who want to meet to review their completed tax return	Straightforward tax returns that do not change from year to year
	\$TBD	\$TBD	\$TBD
	Invoiced monthly	Invoiced monthly	Invoiced annually
<b>Federal &amp; State Tax Returns</b> - prepared within 10 business days - 24/7 access to all tax documents in a secure online portal	✓	✓	✓
<b>Estimated Tax Vouchers</b> - eliminate tax penalties for underpayment	✓	✓	✓
<b>IRS Notice Review</b> - interpret IRS letter and provide guidance on next steps	✓	✓	✓
<b>The Value Guarantee</b> - excellent customer service or your money back	✓	✓	✓
<b>45 Minute Strategy Meeting</b> - gain better understanding of your tax return - tax concepts explained in plain English	✓	✓	
<b>Mid-year Tax Projection Meeting</b> - mid-year meeting designed to give you answers of your tax liability so you can plan	✓	✓	
<b>Weekly IRS Account Monitoring</b> - we download your IRS transcripts weekly to find the tax issues before you receive an IRS notice	✓	✓	
<b>Support Options</b> - we are here when you need us - access to a network of trusted professionals	Unlimited email & phone support (response within one business day)	Email us with your questions and concerns	
<b>Proactive Tax Planning</b> - two financial check-ins to help lower your tax liability, explore your options, boost profits, and achieve your goals	✓		

## What are the differences between the plans?

The Concierge plan gives you unlimited support, so you can reach out at any time with your questions. For example, if you run a small business and your income is higher than expected, it is a great idea to check in before the year wraps up. This way, you can make sure you are taking advantage of all the deductions and see if any tweaks to your entity structure are in order.

The other plans are designed for simpler tax situations with fewer changes happening during the year.

And do not worry—you can switch plans whenever you like!