

# 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
Per month, billed monthly	Per month, billed monthly	Per month, billed 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>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>IRS Notice Review</b> - interpret IRS letter and provide guidance on next steps	✓	✓	
<b>Real Time Tax Projection</b> - mid-year meeting designed to give you answers of your tax liability so you can plan ahead	✓	✓	
<b>Support Options</b> - we are here when you need us (email instead of Google) - access to a network of trusted professionals	Unlimited email & phone support	Email us with your questions and concerns	
<b>Weekly IRS Account Monitoring</b> - we download your IRS transcripts weekly to find the tax issues before you receive an IRS notice	✓		
<b>Proactive Tax Planning</b> - two consultations (Sept & Dec) to reduce tax liability, understand your options, increase profits, meet goals, etc.	✓		

## What are the differences between the plans?

The Concierge plan has unlimited support, which means you can reach out at any time with your questions. For example, if you own a small business and your annual income is higher than expected, you might want to touch base before the end of the year to make sure you are taking advantage of all the available deductions and that no change in entity structure is needed.

The other plans are aimed at less complicated tax situations with fewer changes taking place during the year.

You can change the plans at any time.