



CPA Group, P.C.

Taking Away the Hassles of Tax



Tax Preparation is complicated

There are strict deadlines for preparing and submitting your tax returns, and multiple key dates for paying tax.

In addition to the main tax return you need to complete supplementary pages for many other types of income including:

- Employment
- Self-employment
- Partnership income
- Rental income
- Foreign income or gains
- Capital gains

Get it wrong and you will have to pay a penalty. And interest.

Taking away the hassle...

Rather than spending hours figuring out which pages to complete, what to put in the boxes, how to calculate any tax due and meeting the filing deadlines, our Income Tax Package takes that hassle away. Don't waste time or worry about getting things wrong, we'll do it all for you.





“We offer you a range of fixed price solutions so you can budget and plan”

Pricing that puts you fully in *control*

Our clients tell us they hate the way the accounting and tax professions price – pricing based on how long the work takes which means you have no idea what the cost is until the work is finished. We hate it too. It doesn't seem fair.

Not only that, everyone is different. Everyone wants a different solution unique to their personal circumstances.

So what we do is offer you a range of fixed price solutions so you can budget and plan. It's very simple; you select from a choice of three packages. And then you can choose from a range of options and build your own package to best suit your needs. You're in complete control of the price.

Our easy payment solution helps your cash flow

To make your cash flow easy and to help with budgeting our tax packages are payable in weekly or monthly instalments (or if you prefer you can pay in full on commencement of the work).



Our Tax Packages at a glance

Whether you need business taxes or personal taxes for business owners, you will find one of our tax packages to suit your needs. The table on the next page summarizes what is included within each of our packages.

Taking away the hassles of tax

Tax Savers - This is the best option for clients seeking comprehensive tax support, advice, and planning to help them plan and minimize their tax bills.

Peace of Mind - This is our most popular option because it includes one tax projection of your upcoming tax liability and reminders of tax payments due. This is the best option if you want complete peace of mind.

Essential - This option is for those who are on willing to miss out on some of the more valuable input from us to lower the cost of our services.

Income Tax Packages:	Tax Savers	Peace of Mind	Essential
Preparation of federal and state income tax return and E filing	✓	✓	✓
Audit protection plan	✓	✓	✓
Monitoring IRS Transcripts for Tax Notices			
Estimated Taxes	Drafted for you	Drafted for you	Email Reminders
Tax Projection – One	✓	✓	✗
Tax Planning Report	✓	✗	✗
1 Hour Tax Planning Meeting by Zoom or In our Office	✓	✗	✗
Business Returns:			
1099 Prep (up to 4)	✓	✓	✓
Property Tax Return (1 Location)	✓	✓	✓
Owner's Comp Survey	✓	✓	✓
Options:			
Off Season Discount	Optional	Optional	Optional
Opt out Audit Protection	Optional	Optional	Optional
Paper Copy of TR	Optional	Optional	Optional
Extra 1099s	Optional	Optional	Optional
Extra Property Returns	Optional	Optional	Optional
Business License	Optional	Optional	Optional
Liquor License	Optional	Optional	Optional
Extra Tax Projections	Optional	Optional	No

All Income Tax Packages include the following:

Advance preparation

Before we begin preparing your return, we will send you a checklist of the items that we need to complete your tax return. Making you aware of what to submit will ensure that work is done as quickly as possible, with as little effort on your part as possible. We want to make it hassle-free for you.

- We will write to you several weeks before the tax season begins to remind you of the information we will need to prepare your return.
- If you have not submitted your information by a pre-agreed date, we will contact you once again to remind you to provide your records.
- At all times, we will make you aware of your legal obligations, deadlines and potential penalties.

Preparation of federal and state tax return and electronic filing

Once we have prepared and you have approved your tax return, we will file it electronically. Here are some of the key benefits of online filing:

- you will know exactly when the IRS, and if applicable, your State taxing authority received it.

- a reduction in processing errors by the IRS,
- you will have more time since you can file right up to April 15th, and perhaps more importantly
- where you are entitled to a tax refund you will receive your money much quicker.

Estimated tax payment vouchers if applicable

The IRS requires that you pay in 90% of your annual tax liability every year to avoid estimated tax penalties. You can pay this either through withholding from your paycheck or other income sources or by making quarterly estimated tax payments. If this applies to you we will prepare the estimated tax payment vouchers for you to pay in the estimated tax every quarter.

Audit protection plan

All three of our packages include our Audit Protection Plan. This gives you peace of mind should you be audited by the IRS or a state or receive a tax notice.

You can be audited on a RANDOM basis. The vast majority of investigations will have nothing whatsoever to do with fraud or negligence; minor year-to-year fluctuations in results may be enough to trigger a full audit.

You will automatically be covered for this year's tax return. If the audit extends to multiple years not covered by this plan, we will prepare a fixed price quotation in advance for that extra work before any additional work is started.

Prepare annual 1099s

The IRS requires that all independent contractors who receive over \$600 per year receive a 1099 at year end. With the Full Package, we will prepare your 1099s, send them to your contractors and vendors, and file them with the IRS. Up to 4 1099s are included. Additional 1099s are subject to an extra cost.

Prepare annual business property tax return

Some counties in various states assess property taxes on the computers, equipment, and furniture and fixtures that a business owns. One property return per location is due every year to report the business assets so the county can assess these taxes. We will prepare one property return per year in all three packages. Additional returns can be filed at an additional charge.

Owner's Compensation Planning

Owner's of S Corporations have to pay themselves a reasonable salary. We help you determine what is reasonable according to IRS standards.

Features of Tax Savers and Peace of Mind Packages:

In addition to the features provided in all three packages, the following are included in the Tax Savers and Peace of Mind Packages:

Estimated Tax Payment Reminders

We will send you reminders before your quarterly estimated tax payments are due, so that you know exactly how much to pay and when to pay it.

Tax Projection during Year

During the year we will prepare a projection of your upcoming tax liability so you can plan on ways to reduce the bill or be prepared to pay it when it is due the following April 15th.



Features of Tax Savers Package:

In addition to the features provided in the Peace of Mind package, the following are included in the Tax Savers Packages:

Tax Planning Report

We want to help ensure you pay not a penny more than your fair share of tax. It's one of the biggest expenses you will have in life.

Each year we will carry out detailed and comprehensive tax planning report before the tax year end to ensure that you pay the lowest possible tax.

Tax projection - end of year

In addition to the projection prepared during the year, we will prepare an additional projection after year end to better estimate the remaining tax bill that will be due the following April 15th.

Package Options

Here are some options available on each package:

Off season discount

To help us balance our workload we will give you a 10% discount on each package if we can prepare your return during our off season (May to July for business returns and May to August for personal returns)

Opt out of audit protection plan

The Audit Protection Plan is included in all three packages, however if you are looking to lower your fees to the minimum you can elect out of the coverage.

Paper copy of returns

We provide you with a PDF copy of your returns electronically when we are done with the returns. However, if you prefer a paper copy of the return, you can elect to have one sent to you.

Prepare extra 1099s

Each package includes four 1099s. We can prepare extra 1099s for an extra charge.

Extra states

Each package includes one state return. We can prepare additional states as well if you have that need.

Tax planning meeting

If you select the Tax Savers Package, you will be receiving a tax planning report that goes into details on how to best save taxes. We can add an option to meet with you in a face to face or remote desktop sharing meeting to review the report.

Weekly or monthly drafting of fees

You can spread the cost of the Income Tax Package over several months by drafting our fees

Property tax returns – extra locations

Each package includes an annual return for one location. We can add extra locations for an extra charge.





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We are happy to answer any questions
you may have so feel free to give us a call
at **770-392-1113**