



# Strategic Tax, Accounting, and Advisory Relationship STAAR Plans – 2023

	Priority	Prime	Premier	Private
<b>Tax Preparation</b>				
Business / Trust Tax Return	✓	✓	✓	✓
Individual Tax Return	✓	✓	✓	✓
Routine Tax Planning / Estimates	✓	✓	✓	✓
<b>Accounting Services</b>				
Comprehensive remote bookkeeper services <sup>1</sup>		✓	✓	✓
QBO subscription – Plus <sup>2</sup>			✓	✓
<b>Payroll Services</b>				
Owner Payroll <sup>3</sup>	✓			
Enterprise Payroll – up to 5 emp <sup>3</sup>		✓	✓	✓
Annual Payroll Processing	✓	✓	✓	✓
1099 filings – up to 10			✓	✓
<b>CFO Advisory Services</b>				
Quarterly Financial Analysis		✓		
Monthly Financial Analysis			✓	✓
Annual Report (Illinois fee not included)			✓	✓
Empower session (1 per year) <sup>4</sup>			✓	✓
Empower Day (1 per year) <sup>5</sup>				✓
Tax Board Session (1 per year) <sup>6</sup>				✓
<b>Audit Representation</b>				
IRS issue resolution - 4 hours <sup>7</sup>			✓	✓
	<b>Annual Fee<sup>8</sup></b>	Please contact us for fee information		
	<b>Monthly Fee<sup>8</sup></b>			

<sup>1</sup> Comprehensive remote bookkeeper services include bank reconciliations for up to 2 business accounts. This can be done on a monthly or quarterly basis depending on the preference of the business. You will receive financial statements based upon your selected reconciliation interval.

<sup>2</sup> As Quickbooks Online ProAdvisors we get preferential pricing on subscriptions that we offer to our clients. We include a plus subscription in your plan and pass some of the savings on to your business. We can setup accountant access to your books which enhances our ability to stay on top of bookkeeping issues.

<sup>3</sup> Additional employees can be added for \$10 per employee per pay cycle

<sup>4</sup> Empower Session is a 90-minute opportunity to tackle all those nagging accounting and tax issues you have been meaning to address

<sup>5</sup> Empower day is all day deep dive into a complex issue that needs resolution. We will stay on it until the job is done or there is a roadmap for success.

<sup>6</sup> Tax Board Session is your access to all 150+ years of experience at Fox Valley Tax Solutions. Every Tuesday during tax season and periodically throughout the year we have a Tax Board 'Pizza' Tuesday lunch in the office attended by all credentialed tax preparers. We will put your specific issue on the menu for a thorough analysis and report back to you with a recommended path forward.

<sup>7</sup> IRS Issue Resolution puts us between you and any taxing authority. Just forward the notice to us within 15 days and we will take it from there. 4 hours of service is generally enough to properly address and close one tax issue.

<sup>8</sup> The fee for STAAR Plans is intended to cover all services needed for a comprehensive solution for your business. We are not in the business of charging clients for multiple additional services. We strongly feel that clients should be encouraged to reach out to us with any issue without concern it will add additional fees. As such, items such as routine tax planning, year-end payroll processing and client set up fees are always included in your fees. Open communication results in vastly better service for our clients and improved ability to take advantage of tax opportunities. Upselling or bait and switch marketing tactics are not part of our business model. We sell our expertise and unwavering commitment to your business success, pure and simple.

<sup>9</sup> The monthly fees listed are designed to meet the needs of most of our clients. Because every client is different, we understand that adjustments to the pricing may be required to tailor a plan to fit the needs of each client.