TAX PLANNING



Why Renew Now?

Tax laws are shifting again and new filings like Beneficial Ownership Information reporting carry steep penalties up to ten thousand dollars plus daily fines. Staying in Tax Planning keeps a dedicated expert watching your structure timing and compliance so you are never caught off guard.

TAX PREP ONLY

For owners who just need accurate compliant tax returns.

Includes:
- Annual tax prep
- Prep review meeting
- Extensions if needed
- Ask a Tax Pro access

Pricing:
- Individual starting $495
- Business starting $995

Best for: *Owners comfortable making decisions on their own.*

TAX PLANNING CONSULTS

One, two, or four strategy meetings per year for owners who want guidance without a full plan.

Includes:
- Everything in Tax Prep
- Strategy meetings
- Tax projections
- Timing guidance

Pricing:
- One consult Basic plus $795
- Two consults Basic plus $1495
- Four consults Basic plus $2495

Best for: *Owners expecting changes like hires equipment purchases refinancing or needing to run decisions past an expert.*

TAX PLANNING PLUS IMPLEMENTATION

A full written Tax Plan plus quarterly implementation support.

Includes:
- Dedicated Tax Planner
- 25 plus page customized Tax Plan
- Step by step action items
- Quarterly strategy meetings
- True tax savings opportunities
- Ask a Tax Pro access

Pricing by revenue:
- Essentials up to 250k: 5000
- Foundational up to 500k: 7500
- Elite up to 750k: 12500
- Custom 750k to 1.5M plus: starting 15000

Best for: *Owners who want a long term strategy designed and executed with one team.*

Got more questions? Click Here

NEXT STEPS

Pick the option that fits the support you want this year. Confirm through your renewal email or client portal. Our team will send the new engagement and schedule your first meeting.

If you're unsure which tier fits your revenue and complexity the Action Accounting team can help you pick the right one.