



PERSONAL SUCCESS PACKAGE

From \$149/Month

EVERYTHING YOU NEED TO REACH YOUR GOALS FASTER.

1 | FINANCIAL SUCCESS PLANNING

A Strategic plan for your personal finances & active support you need to make your goals a reality.

2 | BALANCE SHEET PREP & ANALYSIS

Gain power from knowing the exact picture of your current financial health. Know where you are & track your progress

3 | PERSONAL FINANCIAL REVIEW

Know all the critical areas of your financial life are covered, plus guidance & help if anything is missing.

4 | WITHHOLDING ANALYSIS

Review of your tax withholding to make sure you're aligned with your other goals and protected against any bad surprises.

5 | PROACTIVE TAX PLANNING

Ongoing review of your tax situation so you'll know you're maximizing your after-tax wealth, increasing your dollars to invest in other ways.

6 | PREPARATION & FILING OF YOUR RETURN

Your federal and any state return will be taken care of in the best possible way by our experienced tax professionals

7 | IRS CORRESPONDENCE ASSISTANCE

Never fear correspondence from the IRS, State or local agencies. We'll tell you what it means & exactly what needs to be done to address it.

8 | UNLIMITED ACCESS TO OUR TEAM

Unlimited access to your personal financial advocate. We fight in your corner with knowledge & data you won't find anywhere else!