



# A PLAN TO FIT YOUR NEEDS

	DIGITAL	STANDARD	PLATINUM
Price/Month (with annual commitment)	<b>\$350</b>	<b>\$525</b>	<b>\$1000</b>
Business Structure			
Analysis & recommendation	✓	✓	✓
Incorporation & setup	✓	✓	✓
Foreign registration	(add-on)	✓	✓
Renewal	(add-on)	✓	✓
Multi-structure			✓
Payroll (for S-Corps)	Owner only	✓	✓
Tax Management			
Predictive federal tax forecast	✓	✓	✓
Quarterly payments (via payroll)	✓	✓	✓
Deductions management	✓	✓	✓
Health insurance premiums	✓	✓	✓
Business tax preparation & filing	✓	✓	✓
State tax management		✓	✓
Notice management		✓	✓
Advance Tax strategy			✓
Personal tax (1040) management	✓	✓	✓
Accounting management			
Bookkeeping	✓	✓	✓
Multi-jurisdiction tracking	(add-on)	✓	✓
Financial statements & reporting	Upon request (*)	Quarterly	Monthly
Financial analysis			✓

\* Limited to 2 reports per year, additional reports will be priced per report



	<b>DIGITAL</b>	<b>STANDARD</b>	<b>PLATINUM</b>
<b>Payroll management</b>			
Reasonable compensation study	✓	✓	✓
Review payroll plan	Annually	Quarterly	Unlimited
Auto-pilot	✓	✓	✓
Off-cycle payroll	✓	✓	✓
Paystubs, W-2	✓	✓	✓
Employees	Up to 3 employees (\$25/mo/employee)	1 included + \$25/mo/employee	3 included + \$25/mo/employee
<b>Guidance &amp; advice</b>			
Support	Tickets & Chat	Tickets, Chat & Email	all + phone
Schedule a Support Call	Escalations only	✓ (3-day notice)	Dedicated line
Hit the expert	✓	✓	✓
Education & knowledge base	✓	✓	✓
QBR		Recorded	Live
Dedicated account manager		Dedicated team	Dedicated account manager
Consultation sessions	1 (not including blockout dates)	5 (not including blockout dates)	Unlimited
<b>Add-ons</b>			
Personal tax return (1040)	Starts at \$1000	Included	Included
Non-Formations tax amendments	✓	✓	✓
401K Recording	1-time fee	✓	Included
Access to Health Insurance (via Vault)	1-time fee	1-time fee	Included
LLC Renewal	\$100/year	Included	Included
Cost segregation		1-time fee	1-time fee
Additional consultation sessions	\$500/session	\$500/session	Included
Consultation package (4 sessions)		\$1000**	Included
Additional payroll	\$25/mo/employee (up to 3 employees)	1 included + \$25/mo/employee	3 included + \$25/mo/employee

\*\* Purchased sessions will need to be used (scheduled) within 12 months of purchase. No rollover.