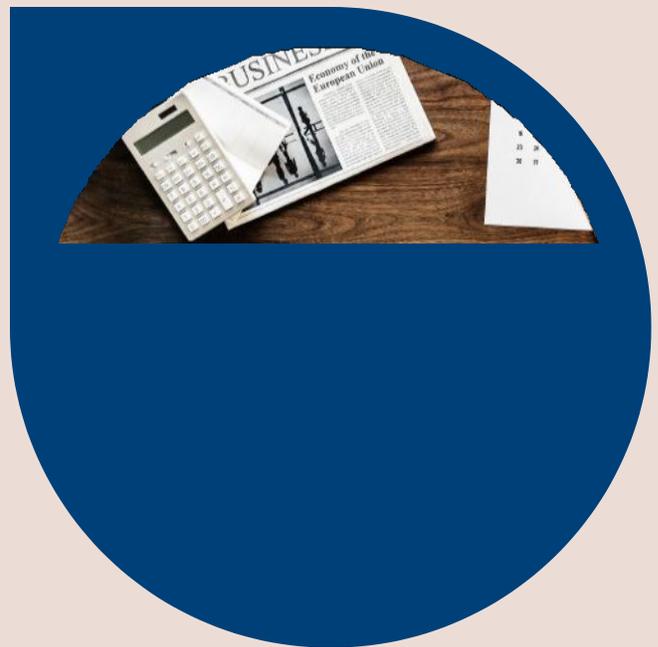
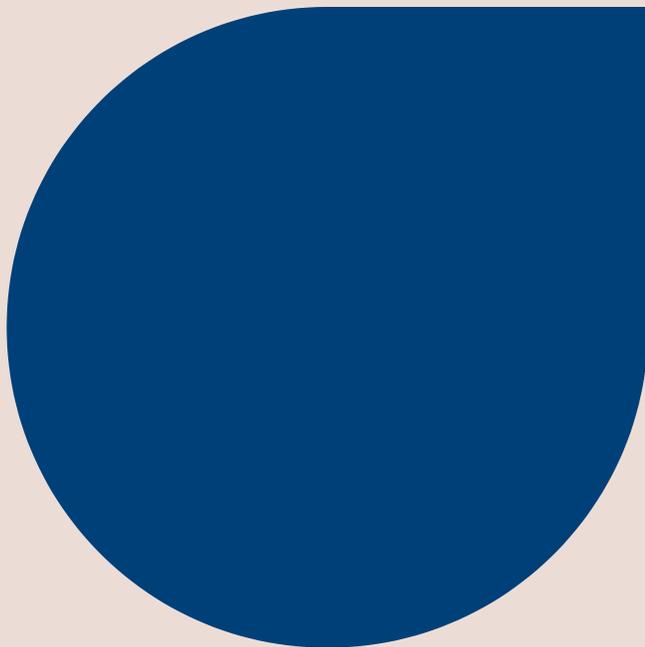




Client Guide

Our intention is for you to reach your tax, financial, & business goals faster.
Get the desired level of help for your needs.



UnitedTaxandFinancial.com

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| Two Options for Help

We offer two options for receiving the help you want.



1. Reporting Only



2. Year-Round Planning + Reporting

Why two options?

- When you file your tax return or balance your accounting, you're simply creating a "report" of what has already happened in the past.
- This is where many tax & accounting firms stop. They report what happened in the past, but they don't provide a "plan" for exactly what you can do to pay less tax in the future or how you can increase your personal or business cash flow.
- We offer two options for working with us, so you can achieve the specific results you care about most:
 1. Reporting & filing with the IRS and State so you stay out of trouble.
 2. Year-Round Planning to help ensure you're paying the least amount of tax possible with a custom strategy for the best possible results in the future.

| Two Options for Help

We offer two options for receiving the help you want.



1. Reporting Only

Our **Reporting Only** option helps you quickly and easily meet your filing requirements with the IRS & State so you can have more time to do the things you enjoy doing.

How it works:

- You invest a simple flat fee each year to “report” to the IRS and State (if applicable) what has already happened.
 - We speak about once a year during tax time to file your return.
 - If you need accounting reporting, we ensure your accounts are reconciled and you have access to quarterly reports.
 - We can only affect your outcomes in limited ways because the year has already passed when we file your return.
 - In this option, you’re billed separately for help with things outside of your tax return or basic accounting.

| Two Options for Help

We offer two options for receiving the help you want.

Our **Year-Round Planning + Reporting** options combine all your traditional filings with our proactive planning process to help you achieve the best possible outcomes in your personal & business financial life.



2. Year-Round Planning + Reporting

How it works:

- You invest a monthly fee, and we allocate dedicated resources to provide strategic planning. Your “reporting” to the IRS and State (if applicable) becomes automated.
 - We meet regularly, year-round, to help ensure you’re paying the least amount of tax possible.
 - We create an action plan to increase your personal and/or business cash flow so you can rest easy knowing your cash is optimized.
 - We help you intelligently grow your personal and/or business balance sheet so you are prepared for the future.
 - Your monthly investment includes help for all present and future strategies or threats + the reporting work we do for you normally.

| When “Reporting Only” is a Good Fit

For clients with basic filing needs & simple finances.

If you can check ***all* boxes** on this list, the **Reporting Only** option may be a good fit for you.



1. Reporting Only

- You are not self employed. Most of your income is reported on a W2 from your employer.
- You do not wish to start or join a business in the near future.
- You do not own (or are a partner in) multiple real estate holdings.
- You have less than \$100k in retirement and/or investment accounts.
- All your income is earned inside the US.
- You don't want/need expert advice to pay the least tax possible.
- You don't want/need a partner to help you reach your goals faster.

| When “Year-Round Planning” is a Good Fit

Proactive planning and the best possible results.

If you can check ***any*** boxes on this list, the Year-Round Planning option may be a good fit for you.



2. Year-Round Planning + Reporting

- You are currently self-employed.
- You want to start or partner in a business soon.
- You own (or are a partner in) multiple real estate holdings.
- You have more than \$100k in retirement and/or investment accounts.
- You have multiple streams of income or income earned outside the US.
- You value expert advice to pay the least tax possible.
- You want a partner to help to reach your goals faster.

When is the Best Time to Get Started?

Once you choose your option for working with us, we can get started based on our availability.



Things to know about getting started

- We only have so many Year-Round Planning spots available, so if you're interested in that level of service, please let us know as soon as possible!
- If you're on a Reporting-Only option and want to upgrade to a Year-round Planning option, you won't have a yearly bill anymore, you'll invest a simple monthly fee to cover our work together.
- There may be setup or cleanup costs necessary to get you healthy enough to qualify for the planning process, but we will discuss those with you before your enrollment.
- If at any time you wish to downgrade to a "reporting only" option, there may be a one-time fee equal to any work already completed for you that year.

Why Work With Us

The advantages you can expect.

The world is changing – some traditional tax & accounting firms aren't designed to give you the help you want & results you need. We Can.



Our unique options for help give you back hours of time so you can focus on the things you love, while we take care of your financials.



Everyone wants more cash flow, stable wealth, and better business margins. Few people know what numbers to focus on to create those results. Everything we do is directly designed to improve the numbers in your financials that matter most.



The majority of Americans don't have anyone to help them with their finances. We partner with you so you're not alone. Take back control, neutralize potential threats, and help eliminate stress from your tax & business finances.



Life is hectic, but you can make progress on your goals if you know exactly what to do, in what order. We work with you to define a simple 3-step action plan so you're never in the dark for what to execute next for better results.

Pricing

Our Pricing is simple and designed to align with your needs.

Our pricing consists of two elements:

1. One-Time Fees

One-time fees cover any costs that will occur once = Setup Fees, Cleanup Fees, Annual Reporting.

2. Monthly Investment

Your monthly investment covers the cost of your year-round planning time & deliverables to keep you healthy and moving toward your goals.

Reporting-Only Options

Year-Round Planning + Reporting



Individuals

Avg. \$300-\$1,000 year

Individuals

Avg. \$59-\$199 month



Businesses

Avg. \$700-\$3,000+ year

Businesses

Avg. \$199-\$999+ month

- The numbers above are averages - your exact investment could be more or less, based on the complexity of your needs and the number of services required (taxes, accounting, payroll, IRS help, etc.).
- Your specific pricing will be based on your unique goals and the option for working with us you select (Reporting Only or Year-Round Planning + Reporting).

Next Steps

Getting started is quick and painless!

1. Contact us – UnitedTaxandFinancial.com

Call or email us and we'll discuss your specific situation and goals for the next 12 months to verify which option is the best fit for you.

2. Pricing & Engagement

We'll create a roadmap for your needs and agree on a price and engagement that perfectly aligns.

3. Enjoy your results!

You'll enroll and we'll take care of all your reporting needs or start the planning process for the best possible results!

What to Expect After You Enroll

Here are four reasons why we guarantee you will love working with us.

1. Communication

Because we limit how many clients we allow into each option, we prioritize proactive communication. We respond to all phone calls and emails within 24 business hours and if you need additional help, we ensure you're on the right engagement package so you can have as much time as you need.

3. Help for Every Stage

Whether you're just getting started, actively growing your business, or are ready to "scale-back", we align our work with the specific stage your life and your financials are in. You never have to feel like your accountant "doesn't get it" ever again. We're on your side and will work on whatever is most important to you.

2. Tangible, Clear Results

We don't waste time on things you don't need or bore you with 40-page reports. If you just want the easiest tax return possible, we have you covered. If you want better results than you're experiencing now, we analyze your key numbers, identify potential threats, and create a custom action plan you can use.

4. More Value - Less Work

Stop wasting time on things that aren't your specialty. You can be amazing at whatever you're doing, and we take care of everything else. This helps ensure the highest and best use of your time and shortcuts your results. We're the firm that gives you back control of your future.



United Tax^{LLC} & FINANCIAL SERVICES

Clarify Your Numbers
& Pay Less Tax

• Save Time &
Stress Less

• Improve Your
Financial Health

Contact us today!



UnitedTaxandFinancial.com

(561) 242-0568

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