

Client Guide

Reach your tax, financial, or business goals faster. Get the perfect level of help for your needs.



Edge Accountants
& Advisors LC



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| Two levels of Help

There are two primary levels of service offered by most tax & accounting firms.



Why two levels?

- 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 the level most tax & accounting firms offer.
- They report what happened in the past, **but they do not 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 the second level of service, 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. Plus, Year-Round Planning to ensure you're paying the least amount of tax possible with a custom strategy for the best results in the future.



| Two Levels of Help

Why this approach works better for our clients.



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

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 ensure you’re paying the absolute 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’re as prepared for the future as you can be.
 - Your monthly investment includes help for all present and future strategies or threats + the reporting work we do for you normally.



| When “Year-Round Planning is a Good Fit

Proactive planning and the best possible results.

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



- You are currently self-employed.
- Or, you have multiple streams of income or income earned outside the US.
- You earn more than \$100,000 annually.
- You want to start a business or partner in a business soon.
- You own (or are a partner in) multiple real estate holdings.
- You have more than \$25,000 in retirement and/or investment accounts.
- You value expert advice to pay the least tax possible.
- You want a partner to help to reach your goals faster.



| The benefits of Working with a Tax Pro Year-round.

Compare the two ways of working with your Tax & Accounting Professional. See which option best fits your needs.

	“Reporting-Only” Firms	Our Approach Year-Round Planning
Annual Onboarding	✓	✓
Tax Data Management	✓	✓
Deductions review	✓	✓
Federal/State Tax Return Prep & eFiling	✓	✓
Annual Tax Results Review		✓
IRS/State Correspondence Assistance		✓
Payroll & Accounting Assistance (if applicable)		✓
Dedicated Advisor & Priority Support		✓
Year-Round Tax Savings Strategies		✓
Done-for-You Strategic Accounting & Payroll		✓
Personal Cash Flow, Net Worth, & Threats optimization		✓
Business Cash Flow, Profitability, & Threats optimization		✓
Top-3 Priorities Action Plan with year-round updates & execution		✓



| When Should You 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!
- There may be setup or cleanup costs necessary to get your accounts organized enough to qualify for the planning process, but we will discuss those with you before your enrollment.
- If at any time you wish to stop your services, 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 – traditional tax & accounting firms aren't designed to give you the help you want & results you need. We Can.



Our unique level of help gives 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 how to create those results. Everything we do improves the numbers in your financials that matter most.



83% of Americans don't have anyone to help them with their finances. We make sure you're not alone. Take back control, neutralize potential threats, and eliminate stress from your tax & business finances.



You can make progress on your goals if you know exactly what to do, and in what order. We define a 3-step action plan so you're never in the dark about 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

Cover any costs that will occur once = Setup Fees, Cleanup Fees, and Annual Reporting.

2. Monthly Investment

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

Year-Round Planning & Reporting Monthly Investment



Individuals

Avg. \$149 - \$999+ month



Businesses

Avg. \$299-\$4,999+ 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 package of services you select when working with us.

- We will regularly review your engagement and if your fees need to change to better align with your goals or situation, we will discuss it together.
- This ensures you pay for the help you need and we're both benefiting from working together.



| Next Steps

Getting started is quick and painless!

1. Contact Us - www.edge.cpa

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 and 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 ensures the highest and best use of your time and shortcuts your results. We're the firm that makes you money and gives you back control of your future.





Edge Accountants
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Clarify Your Numbers
& Pay Less Tax



Save Time &
Stress Less



Improve Your
Financial Health

Contact us today!



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