Payless
TAX ADVISORS

Tax & Accounting
Client Guide

- Save on taxes.
- Grow your cash flow, income, & profits.
- Make progress faster.

We're Different

- Most tax & accounting firms focus on preparing your tax returns and doing your books.
- Everything we do is designed to automate busy work, so we can help you get a **better result moving forward.**

We Offer Specific Levels of Help

1. Reporting-Only

- We file your tax returns and meet IRS requirements. We speak once yearly during tax season.
- If you need additional help during the year, that's billed separately.

2. Planning + Reporting

- Combines all your compliance filings with proactive planning.
- We meet regularly to minimize taxes and help you make progress toward your specific goals.

Reporting-Only Option

1 Simple Flat Fee

Pay once a year to meet your IRS and State filing requirements.

2 Limited Contact

We speak about once a year during tax time.

3 Limited Impact

We can only affect outcomes in limited ways since the tax year has closed when we start preparing your return.

4 Separate Billing

Additional help outside tax returns or basic accounting billed

Planning + Reporting

1

Easy Monthly Payment

We reserve resources for strategic planning with you and automate reporting. Since we're available and working together year-round, you pay a simple monthly fee.

2

On-Going Strategy

Year-round tax planning analysis and recommendations ensure you pay the least tax possible.

3

Action Plan

We create step-by-step plans to help you make progress on the things you care about (like increasing your personal and business cash flow, paying off debt, saving for retirement, buying or selling a business, financing invest properties, etc.)

4

Comprehensive Support

Monthly fee includes help for strategies, support, and threats analysis throughout the year.

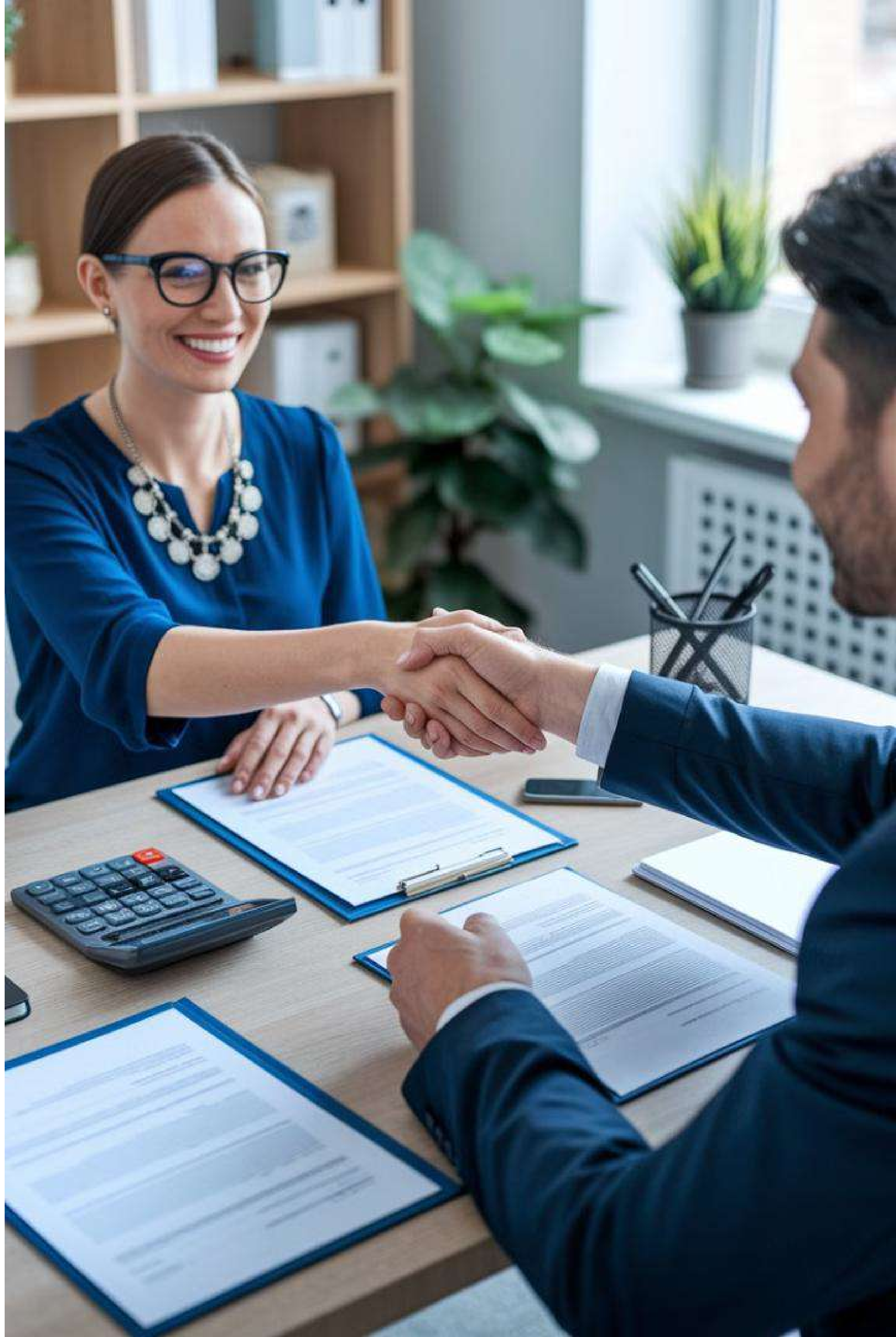
Which Is Right For You

Reporting-Only Fits You If:

- You're not self-employed (W2 income)
- No plans to start a business
- Less than $100k in retirement accounts
- All income earned inside the US

Year-Round Planning Fits You If:

- You're self-employed or have multiple income streams
- Earn more than $100,000 annually
- Own multiple real estate holdings
- Want expert advice to minimize taxes



Compare Your Options 💰

Plan Features	Reporting-Only	One-Time-Tax Plan	Year-Round Planning
Pain-Free Annual Onboarding	✓	✓	✓
Secure Tax Data Portal	✓	✓	✓
IRS/State Tax Return Prep & eFiling	✓	✓	✓
Annual Tax Results Review	✓	✓	✓
Payroll & Accounting Support (if applicable)	✓	✓	✓
Missing Tax Deductions Review and One-Time Projection		✓	✓
IRS/State Correspondence Assistance			✓
Dedicated Advisor & Priority Support			✓
Year-Round Tax Savings Optimization			✓
Done-for-You Strategic Accounting, Payroll, & Year-Round Optimization			✓
Cashflow, Net-Worth, Profitability, & Threats Recommendations			✓
Top-3 Priorities Action Plan with year-round updates & Execution			✓

Our Pricing Structure

- These numbers are averages
- Your exact price could be more or less, based on:
  - The complexity of your needs
  - The number of services required (taxes, accounting, payroll, IRS help, etc.).

$450+

Reporting-Only (Individuals)

Annual fee, varies by complexity

$750+

Reporting-Only (Business)

Annual fee, varies by complexity

$89/mo+

Planning (Individuals)

Monthly investment

$599/mo+

Planning (Business)

Monthly investment

Why Choose Us

Save Time

Our unique options give you back hours to focus on what you love.

Improve Cash Flow

We enhance the financial numbers that matter most to you.

Clear Action Plan

We define a 3-step plan, so you know exactly what to do next.

Never Alone

Take control and get the support you need eliminate stress from your finances.

What To Expect

Real Communication

Responses within 24 business hours.

Clear Results

Custom action plans without unnecessary complexity.

More Value, Less Work

Focus on your strengths while we handle the rest.

Stage-Appropriate Help

Support aligned with your life and financial stage.

Getting Started Is Easy

1

1. Contact Us » www.birkholz.us

Call or email to discuss your goals for the next 12 months.

2

2. Pricing & Engagement

We'll create a roadmap and give you pricing options that perfectly align with your needs.

3

3. Enjoy!

We'll handle all your reporting needs and start identifying ways for you to lower taxes and stress less!

Spend more time on what you love.

Let us take care of your taxes and financials for you.

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Book a free discovery call. Get started today.