

Advisory on call, when you need a straight answer.

Remote consultations on general business and tax topics, as a monthly plan or by the hour.

WHAT IS INCLUDED

- 
Remote consultations
 General business, tax and compliance questions, answered by a CPA.
- 
Monthly plan from \$100*
 Predictable access, with extra charges if significant time is needed.
- 
Priority assistance, +\$50 a month
 Faster scheduling and replies.
- 
Hourly option
 Consult by the hour. Rates are in your engagement letter.

ADD AS NEEDED (QUOTED)

- 
Quarterly tax-planning session
- 
Year-end tax projection
- 
Act 60 annual compliance review
- 
Cash-flow review with Relay, within strict approvals

ALREADY A CLIENT?

Advisory is included in accounting plans starting at \$350. Priority is included in some multi-entity plans.

ADVISORY

From \$100 / month*

Start with a \$45 introduction call.

*Subject to additional charges if significant time is incurred. Priority assistance adds \$50 per month.



Scan to book a
consultation (\$45)