

Tax filing and planning, handled before the deadline.

For Puerto Rico individuals and businesses, including Act 60. We prepare your filings and plan ahead with you, through a secure portal.

WHAT IS INCLUDED

-  **Tax return preparation**
Individual and business returns, prepared and reviewed.
-  **Act 60 compliance**
Proactive annual filing prep, so deadlines never surprise you.
-  **One year of basic tax planning**
Included with your filing.
-  **Secure transfer and file viewing**
Send and review documents in Connect.

HOW TO START

- 1 Book a \$45 introduction call**
We create your client profile and Connect access. This is the only step required to begin.
- 2 Assessment, if needed**
\$200 for most individuals; \$500 for first-time businesses and complex individuals. Includes document review and scope, and may include a planning discussion.
- 3 We prepare and file**
Fees are quoted in your engagement letter before work begins.

WORKS WITH **Connect** | **Ledgible†** | **LedgerSync†** | **and more†**

START HERE

\$45 introduction call

Filing and planning fees are quoted after your call.

†Third-party integrations are billed separately.

Onboarding payments are non-refundable and cover onboarding and planning, separate from engagement fees.



Scan to book a consultation (\$45)