Individual Tax Preparation Packages

MFG TAX SERVICES

At MFG Tax Services, we offer three tailored packages to suit your communication preferences and tax planning needs:

- **Silver Package**
  - Our affordable option, ideal for clients who comfortable with email communication.
  - $800
  - The balance is billed upon completion of the tax return or may be arranged as a monthly service fee.

- **Gold Package**
  - Designed for clients who prefer verbal communication and proactive tax planning.
  - $1,250 - $2,000
    - Billing: A $750 payment is required to schedule your initial phone call with the CPA.
    - The remaining balance is billed upon completion of the tax return or may be arranged as a monthly service fee.

- **Platinum Package**
  - Our most comprehensive service, designed for clients who prefer verbal communication and proactive tax planning.
  - $2500 - $4,500
    - A $2,000 payment is required to schedule your initial meeting with the CPA.
    - The remaining balance is billed upon completion of the tax return or may be arranged as a monthly service fee.

Details for each package are outlined in the chart below.

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SERVICES	SILVER	GOLD	PLATINUM
Federal, one state, and local tax preparation.	✓	✓	✓
Preparation of Schedules A (Itemized Deductions), B (Dividends and Interest), and D (Capital Gains and Losses).	✓	✓	✓
Preparation of Schedule 1, 2 and 3, necessary.	✓	✓	✓
Preparation of Forms 8959 and 8960 for investment income, if required.	✓	✓	✓
Preparation of Form 2441 for dependent care expenses, if required.	✓	✓	✓
CPA review and analysis of your tax return.	✓	✓	✓
Electronic filing of federal and state tax returns.	✓	✓	✓
Electronic delivery of your completed tax return.	✓	✓	✓
Email support for questions about your tax return and for tax-related questions throughout the year.	✓	✓	✓
A 15-minute scheduled phone call with a CPA before tax preparation begins.		✓	✓

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SERVICES	SILVER	GOLD	PLATINUM
A 15-30 minute scheduled phone call with a CPA to review your completed tax return.		✓	✓
A tax planning phone call during the year with a corresponding tax calculation.		✓	✓
Coordination with your financial advisor once per year to estimate taxes.		✓	✓
An in-person meeting of up to 30 minutes with a CPA before tax preparation begins.			✓
An in-person meeting of up to 60 minutes with a CPA to review your completed tax return.			✓
Up to two tax planning meetings or calls (30 to 60 minutes each) during the year with corresponding tax calculations.			✓
Preparation of one Schedule C (Small Business) and up to three Schedule E's (Rental Property).			✓
Preparation of all required schedules and state tax returns.			✓
A 20% discount on additional personal CPA services needed throughout the year.			✓