THE ONYX
CPA GROUP

The Business Owner Package

Benefits & Pricing Guide

www.onyxcpagroup.com

As a client you will receive a customized client experience with our team:

- Proactive, dynamic planning with your entire team (wealth advisor, bookkeeper, attorney, etc.)
- Cloud-based data sharing through our online portal, TaxDome
- Up-to-the-minute changes of tax laws targeted to your specific tax needs
- A holistic, hands-on approach
- On-going tax planning advisory services throughout the year

An Advisory Firm for Professionals

The Onyx CPA Group is an advisory firm that designs customized tax strategies for professionals seeking ways to minimize tax liabilities and maximize tax savings. We believe strongly in “Planning For The Future By Preparing Now.” We strive to get to know you, your family, your business and customize strategies that are tailored to your financial planning goals.

Our Specialty

The Onyx CPA Group has expertise in tax planning and saving strategies that are personalized for the busy professional's set of needs through a streamlined system & process. We work to minimize tax liabilities and maximize tax savings by employing a proactive (rather than reactive) approach to tax planning. Our Comprehensive Tax Planning & Preparation Packages offer break-even planning for annual bonus and/or performance incentives and stock option planning.

Comprehensive Tax Planning, ALL YEAR-ROUND

At The Onyx CPA Group, we provide a holistic, hands-on approach and pride ourselves on offering our clients responsive, competent, excellent service. Our clients are the most important part of our business, which is why, we as a team, proactively work to ensure your complete satisfaction.

Advantages to Working with Us

The Onyx CPA Group is a virtual and green-industry CPA firm. We are a paperless office with cyber security as a top priority. We utilize TaxDome as our cloud-based data sharing online portal, Zoom for client meetings, Acuity for calendar scheduling, E-Signature for easy client review/signatures and Constant Contact for firm/industry updates. We offer the ability for clients to easily view/sign proposals, engagement letters, and pay invoices online via Ignition.

"Planning For The Future By Preparing Now."

	BEYOND THE NUMBERS- BUSY PROFESSIONAL	NEXT LEVEL- BUSY PROFESSIONAL	BASIC-BUSY PROFESSIONAL
Frequency Of Tax Planning Strategies	**Year Around**	**Quarterly**	**Twice A Year**
***Annual Fee Starts At**	**$15,000**	**$10,000**	**$5,000**
Tax Planning Strategies that are personalized to client's particular set of needs and catered to their specific financial goals through a streamlined system & process	✓	✓	✓
Customized client experience with our Team	✓	✓	✓
Expertise in tax saving strategies for employees with employer stock options	✓	✓	✓
Break-even tax planning for annual bonus, performance incentives and/ or stock options	✓	✓	✓
401 (k) Advisement - Provide tax savings calculations on your 401 (k) contributions	✓	✓	✓

Federal & State Tax Return Preparation	✓	✓	✓
Complimentary review of prior year tax returns filed	✓	✓	✓
24/7 Private Cloud Data Access	✓	✓	✓
Video & Screencast Communication	✓	✓	✓
IRS & FTB Notice Response	✓	✓	✓
Planning Meetings with your Financial and Estate Team	✓	✓	
Annual review of your ROI Analysis	✓	✓	
Quarterly Analysis of Profit & Loss Statement with you or your Bookkeeping Team	✓		

Amended Tax Return, Backwork, IRS Audit Representation for tax returns not prepared by our firm	QUOTED	QUOTED	QUOTED
*Tax Plan Implementation Fee	✓	✓	✓
Your tax package may include (but not limited to) the following tax planning strategies:			
Pre-tax + post-tax benefits planning at work (tracking your contributions to your tax-deferred accounts including but not limited to pre-tax 401(k), mega back-door Roth planning, Health Savings, and Flexible Spending account)	✓	✓	✓

Rental Strategies (Section 179 and appropriate non-accelerated depreciation, strategies for Passive Income generators to offset passive losses and more)	✓	✓	
Business Owner Strategies (profit-share planning, tax-free distributions to owners, hiring children, health savings accounts and more)	✓	✓	
Charitable Planning (bunching charitable donations, Donor Advised Fund planning, gifting to family members in lower tax bracket, gifting of non-cash donations to maximize tax savings)	✓		

*Annual fees Start At $5,000, $10,000, and $15,000, respectively. This represents the minimum fee you will pay for that selected package. We custom quote each of our tax packages, so your fee may vary based on the tax strategies in your tax plan. Your customized tax package will be presented during your Preliminary Tax Planning Meeting along with your customized ROI Analysis. (ROI Analysis included in Next Level and Beyond The Numbers Packages Only)

*Your customized tax plan may include a one-time Tax Plan Implementation Fee. This fee will cover the set up and implementation of tax savings strategies included in your customized tax plan that you are not currently taking advantage of. This fee is one-time only and is NOT an annual fee. Your customized Tax Plan Implementation Fee will be presented during your Preliminary Tax Planning Meeting, along with your customized ROI Analysis. (ROI Analysis included in Next Level and Beyond The Numbers Packages Only)