



**REALTOR TAX SERVICES PACKAGE COMPARISON CHART**

	Platinum Package	Gold Package	Silver Package
Last 3 Years Full Income Tax Return Review and Analysis, to obtain a better understanding of your tax situation, check for potential errors and identify any missed opportunities	✓	✓	✓
1099 Filings (Max 20) Prepared and Distributed	✓	✓	
Current Tax Year Federal (IRS) and State, and Local (if applicable) <b>Personal</b> Income Tax Return Preparation (Electronically Filed and Tracked)	✓	✓	✓
Quarterly Estimated Tax Payment Vouchers Calculated and Provided	✓	✓	✓
Current Tax Year Federal (IRS) and State, and Local (if applicable) Separate (if Required) <b>Business</b> Income Tax Return Preparation (Electronically Filed and Tracked)	✓		
Neve No-Worry Audit & Correspondence Protection Effective With Current Tax Year	✓	✓	✓
Neve No-Worry IRS Monitoring Service with Regular Updates	✓		
24/7 personal self-service portal account for unlimited access to tax returns and your supporting documents, and easy and secure upload/downloads – to assist with virtualization of the tax process	✓	✓	✓
Year End Tax Review Call or Meeting With CPA	✓	✓	
Full service Unlimited (Scheduled in Advance) Phone, Web Conference or in Person Meeting support (to answer your questions and address your concerns) throughout the year	✓		
Full service Unlimited Email support (to answer your questions and address your concerns) throughout the year	✓	✓	✓
Quarterly Tax Planning Call or Meeting With CPA	✓		
Team of Award Winning Neve CPA/ Certified Tax Coach current on tax laws and filing requirements	✓	✓	✓
Semi-Annual Income Tax Projection	✓	✓	
FULL CERTIFIED TAX COACH PLAN, Implementation Assistance and Ongoing Tax Plan Maintenance For New Tax Cuts and Jobs Act of 2017	✓		
New Business Entity Analysis and Set-Up (If Required)	✓		
<b>TOTAL VALUE (all services)</b>	<b>\$3,195</b>	<b>\$1,995</b>	<b>\$995</b>
<b>REALTOR ANNUAL FEE*</b>	<b>\$2,391<sup>3</sup></b>	<b>\$1,695<sup>2</sup></b>	<b>\$795<sup>1</sup></b>

ABOVE PACKAGES DO NOT INCLUDE BOOKKEEPING BUT CAN BE UPGRADED TO INCLUDE YOUR REQUIREMENTS AS NEEDED  
 ABOVE PACKAGES DO NOT INCLUDE TAX PROBLEM RESOLUTION BUT CAN BE UPGRADED TO INCLUDE YOUR REQUIREMENTS AS NEEDED

**PACKAGE SELECTED (CHECK ONE)**

\_\_\_\_\_  
Signature\*\*

\_\_\_\_\_  
Date

\_\_\_\_\_  
PRINTED NAME

- <sup>1</sup> Due In One Payment Upon Completion of Services
- <sup>2</sup> Due In Two Payments - One at Signing and Remainder Upon Completion
- <sup>3</sup> Due In 3 Monthly Payments Beginning at Signing

\*ALL Packages Must Be On Automatic Payment Method (CC, ACH, etc.) - Form Will Be Provided

PLEASE RETURN THIS DOCUMENT VIA FAX TO 610-471-0523 or EMAIL TO ENEVE@NEVEGROUP.COM

\*\* IMMEDIATELY UPON RECEIPT OF THIS SIGNED DOCUMENT YOU WILL BE SET UP IN OUR SYSTEM AND ADDITIONAL INFORMATION WILL BE SENT TO YOU VIA EMAIL AND MAIL