

# BUSINESS OWNER PACKAGES

SIMPLE. ACCURATE. AFFORDABLE.

Custom Service Bundles Just For Small Business Owners

## Sole Proprietor Package

- Starts @ 99/Mo
- Monthly Bookkeeping
- Single Owner LLC Return Preparation
- Personal Tax Return Preparation

## S-Corporation Package

- Starts @ 175/Mo
- Monthly Bookkeeping
- Business Tax Return Preparation
- Electronic Copies Tax Documents
- 2553 Election

## Partnership Package

- Starts @ 175/Mo
- Monthly Bookkeeping
- Business Tax Return Preparation
- Electronic Copies Tax Documents

## PRICING

We price our packages on the annual revenue of your business.

To view our current pricing, please visit our website at: [www.tobimarshallcpa.com](http://www.tobimarshallcpa.com)



## ADD ON PACKAGES

Need something more that's not in the standard packages? We can add it on to customize what you need.

**\$460**  
+state fees

### Corporation Setup

Need to file for a Corporation? We'll file with your state, register for a new EIN and if you'd like to be an S-Corporation, we'll take care of the forms necessary to make that election.

**\$55**  
/month

### Tax Planning

By far our most popular add-on offering. With this service, we will help you implement strategies that reduce your tax liabilities each year.

**\$100**  
/month + \$6  
per employee

### Employee Payroll

If you need payroll for your employees, we can manage the entire payroll process for you. We use an online system you and your employees can access.

**\$39**  
/month

### Personal Tax Return

Need your personal tax return prepared by a CPA? We will prepare all your personal federal and state returns with this add-on feature.

## Why Choose Tobi Li Marshall CPA, APC?

Bookkeeping and tax return filing are critical compliance items your business must have, and we provide them. What really sets us apart from other accountants is our focus on saving you money and advising you on where dangers may be lurking for you and your business. Here are just a few of the ways we stand out:

### ▼ Forward Thinking Advice

Most accountants do their compliance work looking backwards at what has already happened in your business and tax life. We take the opposite approach. We want to advise you far in advance of critical deadlines and before it's too late to make cost saving changes. We will meet and discuss your business all throughout the year, so you always know what's coming.

### ▼ Tax Planning

If you hate paying taxes, you're going to love this service! Our efforts throughout the year are focused on getting our clients tax bill as low as possible. With our Tax Planning Add-On Package, we will meet with you each fall to help you implement strategies that reduce your tax liability. You will receive a Tax Projection Summary Report after our meeting.

### ▼ Extensive Onboarding Program

Don't be nervous about changing accountants or using one for the first time, it's not as daunting as it seems with our step-by-step onboarding program. We will walk you through the entire transition so changing over is painless. After onboarding is complete, we continue to support you through our meetings throughout the year.

Start For Free: 626-739-8976

Find us at: 100 Barranca St. Suite 737, West Covina, CA 91791