

ANVIL TAX

Client Guide

Reach your tax, financial, & business goals faster.
Get the perfect level of help for your needs.



AnvilTax.com

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Two Options for Help

We offer two options for receiving the help you want.



1. Proactive Year-Round Planning



2. Reporting-Only

The Problem:

- The world is changing – traditional reactive tax & accounting firms aren't designed to give you the help you want & results you need and deserve.
- When you file your tax return or balance your accounting, you're simply creating a "report" of what has already happened in the past.
- This is where most tax & accounting firms stop. They report what happened in the past, but they don't provide a "plan" for exactly what you can do to pay less tax in the future or how you can increase your personal or business cash flow.

Our solution is a proactive year-round planning so you can achieve the specific results you care about most:

- Year-Round Planning to ensure you're paying the least amount of tax possible with a custom strategy for the best results in the future.

When “Year-Round Planning” is a Good Fit

Year-Round Proactive Planning + Reporting

combine the traditional filings with ProActive planning – helping you achieve the best possible outcomes in your personal & business financial life.



1. Proactive Year-Round Planning

Are you:

- You are currently self-employed.
- You want to start or partner in a business soon.
- You own (or are a partner in) multiple real estate activities.
- You have more than \$100k in retirement and/or investment accounts.
- You value expert advice to pay the least tax possible.
- You want a partner to help to reach your goals faster.

How we work:

- We meet regularly, year-round, to ensure you're paying the absolute least amount of tax possible.
- We create an action plan to increase your personal and/or business cash flow so you can rest easy knowing your cash is optimized.
- We help you intelligently grow your personal and/or business balance sheet so you're as prepared for the future as you can be.
- Your “reporting” to the IRS and State (if applicable) becomes automated.

When “Reporting-Only” is a Good Fit

For those who with basic filing needs & simple finances.

If you can check
***all* boxes** on this list, the
Reporting-Only
option may be a
good fit for you.



2. Reporting-Only

- Most of your income is reported on a W2 from your employer.
- You are *not* self employed.
- You do not wish to start or join a business soon.
- You do not own (or are a partner in) multiple real estate holdings.
- You have less than \$100k in retirement and/or investment accounts.
- You don't want/need expert advice to pay the least tax possible.
- You don't want/need a partner to help you reach your goals faster.

Why Work With Us?

When YOU want a partner to help achieve your goals faster.

How valuable is it for you to have:



- **A tax expert “on retainer”** proactively taking care of all your tax filing needs.
- **An Automated Accounting “Department”** taking care of all your accounting busy work



- **A Financial Strategist (aka “Virtual CFO”)** helping you interpret and apply financial data for better results.
- **Automated Payroll/HR Management** seamlessly taking care of you and your employee’s payroll and HR needs.



- **24/7 Access to a modern accounting platform** automates the “busy-work”, so you have more time to focus on what you are good at.
- **A Partner working along side** and not feeling alone while helping you make your business successful.



- **Up-to-Date Financial Tracking & Reporting** so you can see exactly what’s happening with the money in your business.

Pricing

Our Pricing is simple and designed to align with your needs.

Monthly fee

Your monthly fee covers the cost of your year-round planning to keep you healthy and moving toward your goals.

Year-Round Planning + Reporting

Startup

From \$99-199 mo

For businesses just getting started or on a tight budget.

Growth

\$299-699/mo

For businesses ready to automate and focus on the key things needed to grow faster.

Scale

\$699+ more/mo

For mature, revenue saturated businesses.

All packages include federal & state tax returns.

- The numbers above are averages - your exact fee could be more or less, based on the complexity of your needs and the number of services required (taxes, accounting, payroll, IRS help, etc.).
- Your specific pricing will be based on your unique goals and the option for working with us you select (Reporting Only or Year-Round Planning + Reporting).

What to Expect After You Enroll

Here are four reasons why we guarantee you will love working with us:

1. Communication

Because **we limit how many clients** we allow into each option, **we prioritize proactive communication**. **We respond** to all phone calls and emails **within 24 business hours** and if you need additional help, we ensure you're on the right engagement package so you can have as much time as you need.

3. Help for Every Stage

Whether you're just getting started, actively growing your business, or are ready to "scale-back", we align our work with the specific stage your life and your financials are in. You never have to feel like your accountant "doesn't get it" ever again. **We're on your side** and will work on whatever is most important to you.

2. Tangible, Clear Results

We don't waste time on things you don't need or bore you with 40-page reports. If you just want the easiest tax return possible, we have you covered. If you want better results than you're experiencing now, **we analyze your key numbers, identify potential threats, and create a custom action plan** you can use.

4. More Value - Less Work

Stop wasting time on things that aren't your specialty. You can be amazing at whatever you're doing, and we take care of everything else. This **ensures the highest and best use of your time** and shortcuts your results. We're the firm that makes you money and gives you back control of your future.

Contact us Today!

Clarify Your Numbers &
Pay Less Tax

Save Time &
Stress Less

Improve Your
Financial Health

Next Steps:

1. Find a time to chat visit us at:
discovery.anviltax.com

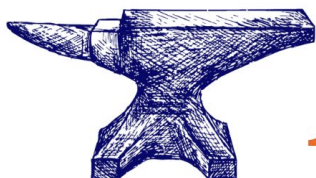
Schedule a time to chat to discuss your specific situation and goals for the next 12 months to verify which option is the best fit for you.

2. Pricing & Engagement

We'll create a roadmap for your needs and agree on a price and engagement that perfectly aligns.

3. Enjoy your results!

You'll enroll and we'll take care of all your reporting needs or start the planning process for the best possible results!



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