

# ANNUAL EXPAT TAX SERVICES

by

**KROZEL** CAPITAL

*Taxes • Investments • Financial Planning*

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# Your Guide.

Dear Prospective Client,

As an expat, you are subject to different U.S. tax rules and many firms do not understand the complexities of the foreign earned income exclusion, foreign tax credits and tax treaties. Our team at Krozel Capital are experts in this field.

We also understand the general intricacies and flow of living the expat life. My family and I have moved five times in the last 12 years, with three of those moves being international.



As such, we understand your needs and our virtual tax process has been designed just for you.

Our unique combination of skills and credentials is our biggest asset, as we provide differentiated tax services to U.S. citizens who live worldwide.

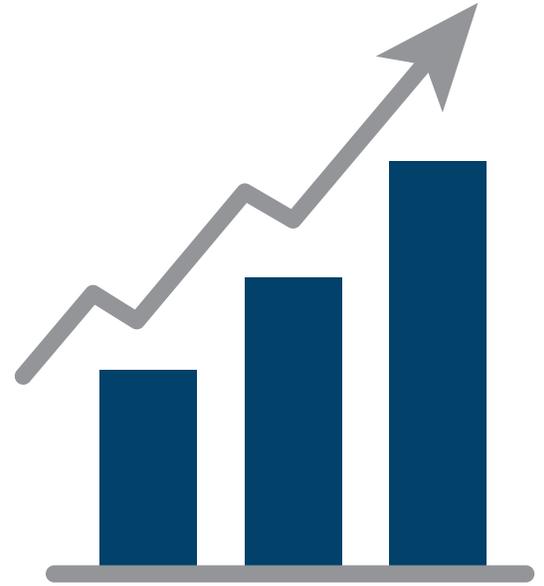
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**Professional Quality. Personal Service.**

# Your Plan.

Our firm offers three proactive plans for your personal tax needs: Standard, Premium & Elite.

Each plan includes your individual income tax return and access to our digital tools. Plus, you have the option to add additional services. You can customize your plan based on your unique position.



You are one of a kind.  
Your tax solutions  
should be one of a  
kind, too.

Select the best plan that works for you, your family, and your budget.

If you need additional help throughout the year, simply add on to your plan using the Proactive Services list described in this portfolio.

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# Your Success.

Our goal is to help you avoid the pitfalls of tax blunders and mishaps, keep you tax compliant and become your trusted financial partner.

We look forward to helping you navigate the world of expat taxes with Professional Quality and Personal Service!

*Kaitlin M. Krozel, CPA*



Certified Public Accountant, AZ  
MSBA, Financial & Tax Planning

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Client Service

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ANNUAL EXPAT  
TAX  
SERVICES

# ELITE TAX PLAN

- Federal Individual Return + PRIORITY SERVICE
- In-Depth Tax Return Review Video + Analysis
- Customized Tax Estimate for the Coming Year
- Annual Tax Planning & Strategy Meeting
- Collaboration with Other Advisors
- One-on-One Live Meetings
- Fed & State Tax Notice Resolution (up to 3 hrs)
- 20% off any additional resolution services
- Client Portal/App, E-Signatures, Virtual Meetings, Online Organizers

## BEST FOR:

Individuals who need a full-service, year-round solution with priority service options. Clients with complex and variable income, where proactive tax planning outside of tax season is necessary

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# PREMIUM TAX PLAN

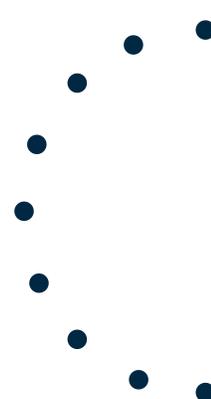
- Federal Individual Return
- In-Depth Tax Return Review Video + Analysis
- Customized Tax Estimate for the Coming Year
- One-on-One Live Meetings
- 20% off Tax Resolution services
- Interpretation of Federal & State Tax Notices
- Client Portal/App, E-Signatures, Virtual Meetings, Online Organizers

## BEST FOR:

Individuals with variable compensation who need customized tax estimates for the upcoming year.



# STANDARD TAX PLAN



- Federal Individual Return
- Interpretation of Federal & State Tax Notices
- Client Portal/App, E-Signatures, Virtual Meetings, Online Organizers

## BEST FOR:

Individuals with steady year-to-year income who want the availability to add services and consultation time as needed.

# All Annual Expat Plans Include:

- **Federal Individual Income Tax Return:**
    - Form 1040 - Main Federal Tax Form
    - Schedule A - Itemized Deductions
    - Schedule B - Interest & Dividends
    - Sched D - Capital Gains/(Losses)
    - 1 Form K-1 - 1 Passthrough Entity
    - 1 Schedule E - Rental Property
    - 1 Form 2555 - Foreign Earned Income Exclusion
    - Forms 1116 - Foreign Tax Credits
  - **Interpretation of Tax Notices**
  - **Client Portal/App + E-Signatures**
  - **Virtual Meetings + Online Organizers**
  - **Live Webinars with Q&A Session**
- PLUS:**
- **Access to fee-only financial planning & investment services\*\*\***

*\*\*\*Provided through Krozel Capital Management, LLC, licensed as a Registered Investment Adviser (RIA) in the state of Arizona.*

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# PLAN COMPARISON

Expat Based Service Tiers	STANDARD	PREMIUM	ELITE
Individual Federal Tax Return Preparation	✓	✓	✓
Interpretation of Federal & State Tax Notices	✓	✓	✓
Client Portal/App, E-Signatures, Virtual Meetings, Online Organizers	✓	✓	✓
Personalized Tax Return Review Video + Two-Year Comparison		✓	✓
Customized Tax Estimate for Current Year (2025)	+ additional fees	✓	✓
Resolution of Federal & State Tax Notices	+ additional fees	20% Discount	✓
Annual Tax Planning Meeting to Discuss Strategies + Goals + Questions	+ additional fees	+ additional fees	✓
Priority Service			✓
Collaboration with your Other Advisors			✓

# Individual Services

Services	Fees
Average Fee per Additional Form	\$100-\$200
U.S. State Tax Return	\$250
CPA Hourly Rates	\$325 (clients)
Non-CPA Hourly Rates	\$175
Customized Tax Estimate	\$250
Financial Planning/Investment Services	Provided through Krozel Capital Management, LLC, licensed as a Registered Investment Adviser (RIA) in the state of Arizona.

# Your Choice.

We take on a limited number of new clients for each tax deadline. This enables us to make sure we can continue to provide excellent service.

Select your plan & reserve your spot today!



or



Email

[info@krozelcapital.com](mailto:info@krozelcapital.com)

Complete an inquiry form on our website

for a fee quote

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## Tax Filing Deadlines:



**APRIL 15TH**

(U.S. based Taxpayers)



**JUNE 15**

(Expat Taxpayers)



**OCTOBER 15TH**

(On extension)



*Act now while there is time!*

Tax season is now and the deadline will be here before you know it.

Book your Annual Tax Services Plan today so we can provide you with Professional Quality and Personal Service!



**Email:**

**[info@krozelcapital.com](mailto:info@krozelcapital.com)**

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*Thank You!*

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