

ANNUAL TAX SERVICES (U.S. CLIENTS)

by

KROZELCAPITAL

Taxes • Investments • Financial Planning

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Your Guide.

Dear Prospective Client,

Constant tax changes over the past few years have been like waves of tsunamis. Between tax law revisions, inflation, and a potential recession, there are many reasons to partner with a trusted firm.

We specialize in:

- Rental properties
- Equity compensation
- Business reporting
- Multi-state reporting
- Military & Foreign Service
- Foreign income & tax credits
- Foreign Nationals/Non-US Citizens



We understand that life does not only happen during tax season and are available year-round for your questions and planning needs.

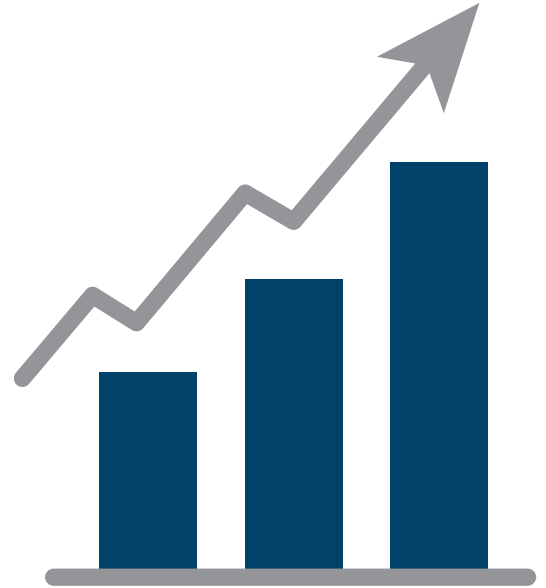
Our unique combination of skills and credentials is our biggest asset, as we provide differentiated tax services to US taxpayers who live across the US and the globe.

Professional Quality. Personal Service.

Your Plan.

Our firm offers three proactive plans for your personal financial needs.

Each plan includes your individual income tax return and access to our digital tools. Plus, you have the option to add additional services, too. 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 tax with Professional Quality and Personal Service!

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MSBA, Financial & Tax Planning

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ANNUAL TAX
SERVICES
(U.S. CLIENTS)

ELITE TAX PLAN

- Federal Individual Return + 1 State Tax 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)
- 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.

Professional Quality. Personal Service.

PREMIUM TAX PLAN

- Federal Individual Return + 1 State Tax 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 and/or want customized tax estimates for the upcoming year.

Professional Quality. Personal Service.



STANDARD TAX PLAN



- Federal Individual Return + 1 State Tax 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 U.S. Plans Include:

Federal Individual + 1 State 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
 - 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.*

Professional Quality. Personal Service.

PLAN COMPARISON

US Based Service Tiers	STANDARD	PREMIUM	ELITE
Individual Federal + 1 State 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 the Next Year (2024)	+ additional fees	✓	✓
Resolution of Federal & State Tax Notices (up to 3 hours)	+ 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	\$225
CPA Hourly Rates	\$275
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.

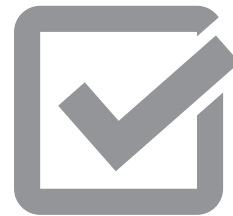
Your Choice.

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

Complete an inquiry
form on our website
for a fee quote

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

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Thank You!

KROZEL CAPITAL

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