

# ANNUAL TAX SERVICES

*by*

**KROZEL** CAPITAL

*Taxes • Investments • Financial Planning*

20  
23

# ELITE TAX PLAN

- Federal + State Individual Tax Return
- In-Depth Tax Return Review Video + Analysis
- Customized Tax Estimate for the Coming Year
- Annual Tax Planning & Strategy Meeting
- Priority Service + Collab with Other Advisors
- One-on-One Live Meetings
- 5 hours of Tax Resolution
- Client Portal/App, E-Signatures, Virtual Meetings, Online Organizers

## BEST FOR:

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

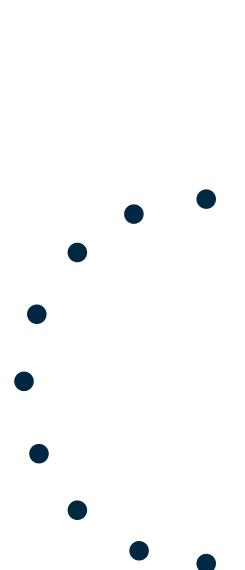
Professional Quality. Personal Service.

# PREMIUM TAX PLAN

- Federal + State Individual 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

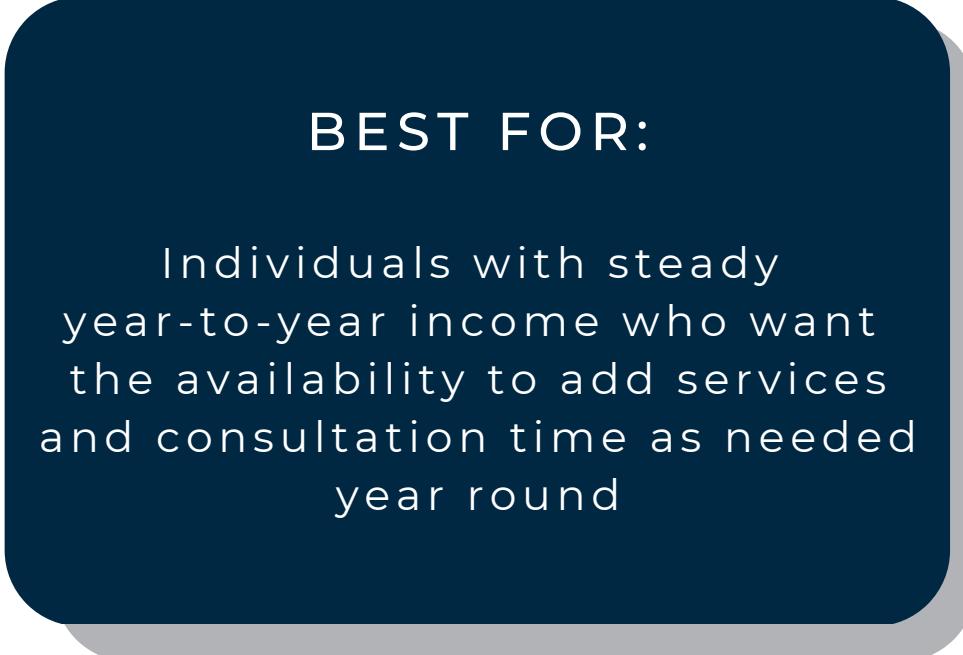
## BEST FOR:

Individuals with variable compensation and/or want customized tax estimates for the upcoming year



# STANDARD TAX PLAN

- Federal + State Individual 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 year round

# All Annual 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

## Primary Residence State Individual Tax Return

## Interpretation of Federal & State Tax Notices

Client Portal/App + E-Signatures

Virtual Meetings + Online Organizers

PLUS:

Live Webinars with Q&A Session

and

Access to Krozel Capital Management, providing integrated, fee-only financial planning & investment services\*

\*Separate engagement from tax services as provided by Krozel Capital Tax, LLC. Additional fees apply for these services. Krozel Capital Management, LLC is registered as an investment adviser (RIA) in the state of Arizona.

# PLAN COMPARISON

US Based Service Tiers**	STANDARD	PREMIUM	ELITE
Annual Federal Package + 1 State Individual 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 (2023)		✓	✓
Resolution of Federal & State Tax Notices		20% Discount	✓
Annual Tax Planning Meeting to Discuss Strategies + Goals + Questions			✓
Priority Service + Collaboration with your Other Advisors			✓

*\*\*For clients living outside the United States, the packages do not include a state return.*

# Your Choice.

When you are ready to make a selection,  
follow these steps:



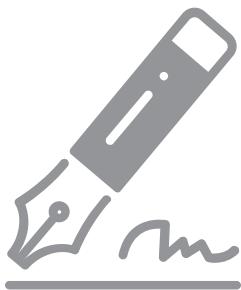
Email  
[team@krozelcapital.com](mailto:team@krozelcapital.com)



Identify  
Your Service  
Selections

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Once confirmed, your action items will be to:



e-Sign  
Engagement Letter



Pay  
Service Retainer



Complete  
Tax Organizer



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

Professional Quality. Personal Service.



# Thank You!

KROZEL CAPITAL  
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