

ANNUAL TAX SERVICES

by

KROZELCAPITAL

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

Professional Quality. Personal Service.



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.

Professional Quality. Personal Service.

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



Identify
Your Service
Selections

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

Professional Quality. Personal Service.



Thank You!

KROZEL CAPITAL
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Personal Service.

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