

# SMALL BUSINESS - PACKAGE FEES



## **Business Entity Start up Business Entity Selection Online Accounting Program Set up**

\_\_\_\_\_ **Business Entity Set Up-** Choosing the right business entity can save you thousands of dollars in taxes while also minimizing your personal exposure to legal issues.

We will review your business, determine the best entity and set it up for you.

We will obtain the Federal EIN; and State Registration No (if needed) for sales tax. **Prices start at \$300** (please note cost does not include state or federal entity filing fees. Those costs will vary from state to state)

\_\_\_\_\_ **Converting LLC to S Corp/C Corp Election-** Changing the tax status of a business is a complex issue and has potential tax and other effects. We will assess your current tax election and complete the forms necessary to make the election. **Price at \$250.00**

\_\_\_\_\_ **Setting up Quickbooks Online** Setting up Quickbooks is essential for your business. We will review the basic set up with you. We will review and set up your Chart of Accounts. We will educate you on the difference between account types and train you on adding bank and credit card accounts and posting transactions correctly. **Price at \$250.00 includes 2 full hours of set up and training; additional time will be billed hourly. Further instruction available if needed.**



# Small Business Accounting Services –

Do you have questions throughout the year on your business? Looking for a review of your financials on a quarterly basis?

Do you need help estimating your quarterly tax payments?

Do you need full accounting/bookkeeping?

## **\_\_\_\_\_ Initial Consultation – \$75.00**

During our first meeting we will assess your current status and accounting/tax needs for your small business. We will answer any initial questions, discuss goals, and determine which direction and package works for you and your Small Business.

## **\_\_\_\_\_ Basic - Estimated quarterly**

- Review your QuickBooks Online or Self-prepared Profit and Loss Statement.
- Up to 1 hour in person/or via Virtual Meeting consultation per quarter.
- unlimited email inquiries.
- determination of your estimated quarterly tax payments,
- prepared Tax Planner Pro Report.

**Price at \$250.00 per quarter.**

**Does not include bookkeeping, posting entries, reconciling bank accounts. Additional charges would apply**

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## **Advanced – Estimated quarterly**

- Includes all items in Basic Package
- Additional services - review your bookkeeping in QuickBooks online/desktop to verify transactions are posted correctly; assist with reconciliation questions; and determination of your estimated quarterly tax payments.

**Price at \$450.00 per quarter.**

**Does not include bookkeeping, posting entries, reconciling bank accounts. Additional charges would apply**

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## **Full-Service Accounting and Bookkeeping Service.**

- Includes all items in Basic and Advanced Package
- Additional services – posting transactions from checking/savings account; credit card statements.
- Reconciliation of bank statements
- Compilation of Financial Statements
- Monthly or quarterly.

**Price starts at \$250.00 per month.**

**Monthly fee will be determined based on amount of transactions and work involved. Upon review of your financial records, we will prepare a quote for services.**



**NOT READY FOR FULL ACCOUNTING PACKAGE**

## **COACHING/ BUSINESS DEVELOPMENT.**

**We offer business consultation/small business  
coaching packages**

**ON AN AS NEEDED BASIS**

**\_\_\_\_\_Additional Small Business Coaching/Development.**

**One Time Session     \$150.00 per hour (we do offer ½ hour session for  
\$75.00)**

Need more assistance with your small business, not ready for  
accounting/bookkeeping work, no need for tax estimates – but need additional  
assistance, questions answered, guidance.

**Packages Available**

**\$500 for 4 Sessions**

**\$1200 for 12 Sessions**

**Sessions do not expire and do not need to be used concurrently.**



# SMALL BUSINESS TAX PREPARATION

\_\_\_\_\_ **Small Business Tax Preparation – Schedule C** – If you are a sole proprietor or a single member LLC without an S Corporation election, your small business transactions will be reported on Schedule C of your person return (Form 1040). As you might know a single member LLC is considered a disregarded entity, therefore it does not have a separate small business tax return – this is a common misconception.

Our fee for this tax return preparation is typically \$500 to \$700. Good organization can overcome complexity –

with the Small Business Package your **fee for Tax preparation will start at \$250.00** (Tax preparation price will be determined by a full review of all items for personal return – discounted rates apply)

**THIS IS FOR BUSINESS PORTION ONLY** – If you have other tax items W2, Rental Income, Investment Income – additional fees may apply.

\_\_\_\_\_ **Small Business Tax Preparation – Form 1065 or Form 1120S – LLC with an S Corp Election.** Good organization can overcome complexity

– with the Small Business Package your **fee for Tax preparation will start at \$500.00**

(plus personal return preparation is additional charge, starting at \$100 (Tax preparation price will be determined by a full review of all items for personal return – discounted rates apply)

# Payroll – Additional Services

It is a struggle for small businesses to be constantly dealing with payroll. As part of our services, AM Accounting and Tax Services LLC will help you manage that effort and make it easy to get a consistent payroll system in place.

We have partnered with payroll provider



and will work with you to provide payroll for your small business. This will give you one less thing to think about and allow you to focus on growing your business.

- An easy, three-step payroll process that can be completed in minutes, with auto-payroll options
- a Flexible payment options including direct deposit and printable checks
- federal, state, and local taxes automatically calculated, filed, and paid, and backed by SurePayroll 100% guarantee.
- more time back in your day to focus on growing your business

**Pricing starts at \$150.00 per month** (for up to 2 employees, additional fees may apply for more than 2 employees).

(Business owner managed payroll available for reduced fee – please contact us if interested)