

# Choose Your Tax Planning / Advisory Level

	Foundation	Growth Most Popular	Executive
Ideal For	Business Owners	Growing Businesses	High-Net-Worth
Annual Investment	\$3,500+	\$6,500+	\$10,000+
Tax Prep Included	—	✓	✓
Strategic Tax Planning	✓	✓	✓
Quarterly Reviews	—	✓	✓
Priority Support	—	—	✓
3-Year Audit Protection	✓	✓	✓
Private Hotel Incentive	—	🎁 2–5 Nights	🎁 2–5 Nights

# 2026 Tax Preparation Pricing

*Prepared by an IRS Enrolled Agent • 3-Year Audit Protection Included • Private Hotel Incentive*

**Pricing is based on complexity, not forms. Final pricing is confirmed after review.**

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## INDIVIDUAL TAX RETURNS

Level	Best For	What's Included	Starting Price
<b>Basic</b>	W-2 / 1099 Filers	Federal + 1 state • E-file • Secure portal • EA review • Audit protection	<b>\$595</b>
<b>Investor / Homeowner</b>	Investments, itemized deductions	Everything in Basic + investment income, Schedule A, retirement income	<b>\$795</b>
<b>Self-Employed / Rental</b>	Business owners or landlords	Everything above + Schedule C (1 business) or Schedule E (up to 2 rentals), depreciation review	<b>\$995</b>

 Additional businesses, rentals, or complexity quoted separately.

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## BUSINESS ENTITY RETURNS

Entity Type	Best For	Includes	Starting Price
<b>Small Business</b>	Under \$1M revenue	1120-S / 1065 / Complex LLC • K-1s • Compliance review • EA audit protection	<b>\$1,800</b>
<b>Mid-Size Business</b>	\$1M–\$3M revenue	Multi-owner • payroll review • multi-state considerations	<b>\$2,800</b>
<b>Complex / Multi-Entity</b>	\$3M+ revenue	Advanced structures • multiple states • multiple entities	<b>\$3,800+</b>

## WHAT'S INCLUDED WITH EVERY RETURN



3-Year Audit Protection



EA-Prepared Return



Secure Client Portal



Accuracy & Compliance Review



Post-Filing Support

## OPTIONAL SERVICES (QUOTED AS NEEDED)

Service	Typical Range
Prior-Year Returns	\$750 – \$1,500 / year
Amended Returns	\$650+
IRS Notices & Resolution	\$350 – \$1,200
Multi-State Filings	\$200+ per state
BOI / FinCEN Filing	\$250

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## CONFIDENCE STATEMENT (KEEP THIS AT THE BOTTOM)

*We don't charge by the hour or by the form.*

*We charge for accuracy, protection, and peace of mind.*

### Travel Incentive Disclosure

Certain promotions offered by **Union National Tax, LLC** may include access to a *private hotel incentive* as a **third-party marketing bonus**. This incentive is provided by an independent travel promotion provider and is **not owned, operated, or administered** by Union National Tax, LLC.

This incentive is **not a free hotel stay** and does not constitute a guaranteed reservation. All travel incentives are **subject to availability, activation requirements, blackout dates, and the terms and conditions of the travel provider**.

Recipients are responsible for all applicable **taxes, resort fees, transportation, meals, and incidental expenses** unless otherwise expressly stated by the provider.

Union National Tax, LLC does not make any representations or warranties regarding hotel accommodations, travel availability, or services. Participation in or redemption of any travel incentive is **voluntary** and governed solely by the provider's terms.

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## **Travel Incentive Disclaimer (Short Form)**

Travel incentives are promotional bonuses provided by a third-party travel provider and are not owned or operated by Union National Tax, LLC. Incentives are subject to activation, availability, and separate terms and conditions. Taxes, fees, and incidental expenses may apply.

# **Staff Credentials**

Desi A, Paralegal, Notary Public

Chris A, MBA

Ana S, QuickBooks Pro Advisor

Nela S, QuickBooks Pro Advisor

Sue D, MBA-Finance, Senior Tax Accountant

Jose M, Director of Restaurant Operations