



# NCH WEALTH ADVISORS

## MENU OF SERVICES

Services	Description	Price
<b>Tax Preparation</b> <i>Basic preparation for basic needs</i>	Preparation Of Individual Tax Return (1040), Preparation Of Minor Children Tax Returns (1040ez), Year-End Tax Projection, Telephone Consultations, Incidental Government Correspondence, and Secure On-Line Storage Of Tax Return	Fee Starts at <b>\$500</b> Per Individual Return.
<b>Premier Tax CFO</b> <i>All the tools to get your financial world in order</i>	Preparation Of Individual Tax Return (1040), Preparation Of Minor Children Tax Returns (1040ez), Quarterly Tax Planning, Telephone Consultations, Incidental Government Correspondence, Secure, On-Line Tax & Critical Documents Vault, Personal Premiere Tax CFO Assigned To You, Secure, On-Line Financial World Portal, Tax Reduction Assessment, Retirement Planning Review For Tax Purposes, 401(K) Distributions Review For Tax Purposes, Estate Planning For Tax Purposes, Beneficiary Review, Home, Auto And Umbrella Insurance Review, Disability Income Analysis, Long-Term Care Analysis, Health Insurance Options, and Survivor Income Analysis	<b>\$1250/Year</b> or 125/Month <i>With a One-Time Set-Up Fee of \$500</i>
<b>Small Business Tools</b> <i>Empowering you to run your business on your terms</i>	<b>SBT QuickBooks</b> Always Current Version of QuickBooks, Uses Any Internet Browser, Record And Print Checks, Record Deposits, Reconcile Bank And Credit Card Accounts, Track Customer Invoices, Create Statements, Control Cash Flow With Bill Tracking, Create Custom Forms: Invoices, Purchase Orders, Sales Orders, & Estimate Forms, Generate Business Reports, and Track Inventory <b>SBT Payroll</b> Email Deposit Reminders, Email Reports Due Reminders, Always Current Payroll Rates, Process Payroll From Any Internet Browser, Allows Payroll Check Printing & Direct Deposit, Allows Benefits Programs Contributions Calculations, Reporting Forms Pre-populated For Filing <b>SBT Records Vault</b> Secure, On-line Storage Of Important Business And Tax Documents, Access Records From Any Internet Browser	<b>\$150/Month</b> <i>With Additional Service Packages Available.</i>
<b>SBT Set-Up</b> <i>Start your package right</i>	Chart Of Accounts Creation, Balances Entry, 2 Hours System Training, 90 Days Tech Support	<b>\$250</b> One-Time Fee
<b>SBT Conversion</b> <i>Convert your critical data</i>	Includes <b>SBT Setup</b> , Create Vendor Lists, Create Inventory Lists, Create Customer Lists, Balances Entry	<b>\$500</b> One-Time Fee
<b>SBT Data Transfer</b> <i>Move your client-specific data</i>	Includes <b>SBT Conversion</b> , Detailed Sales Entries, Expense Activity Entries, Reconciliation Of Entries	<b>\$750</b> Per Quarter Transferred
<b>On-Demand Bookkeeper</b> <i>Pay for work where you need, when you need it</i>	Bank & Credit Activity Entry ( <i>Requires Use of Small Business Tools Package</i> )	<b>\$150</b> Per Month of Activity
<b>On-Demand Accountant</b> <i>A second set of eyes</i>	Bank & Credit Reconciliations, Payroll Tax Reconciliations ( <i>Requires Use of Small Business Tools Package</i> )	<b>\$150</b> Per Month of Activity
<b>On-Demand CFO</b> <i>When the tough decisions need to be made</i>	Business Tax Planning, Profitability Analysis, Cash Flow Planning, Industry Comparison, Direct CFO Consultation	<b>\$300</b> Per Request
<b>On-Demand CPA</b> <i>For help with outside groups</i>	CPA Compiled Financial Statements ( <i>Requires Use of Small Business Tools Package</i> )	<b>\$100</b> Per Request
<b>Business Accounting</b> <i>Fully customized for your business</i>	Fully-Customized Accounting Services For Your Business	Fees Quoted Separately

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\*/+ Licensed to Practice as a CPA in this state.