CLIENT CARE PLAN

WHAT'S INCLUDED

Included on request in the base Client Care Plan:

DATA MANAGEMENT & SECURITY - *Secure storage for shared personal and financial documents (e.g., estate plans, powers of attorney), review of your online security setup, and delivery of a written information security plan.*

ACCESS - *Response from your CPA within one business day for coaching or guidance via phone, email, video, or text.*

TAX - *Preparation and electronic filing of tax returns, support for electronic payments and refunds, confirmation of filing acceptance, estimated tax calculations, transcript retrieval, interpretation of IRS/state notices, quarterly reviews, and strategic tax planning discussions.*

PLANNING - *Ongoing, conversation-based support for business and personal financial planning, including progress tracking and updates as needed.*

BANKING AND INVESTMENTS - *Review of statements and investment reports from your benefits plan administrator, advisor or custodian, and support creating or updating your investment plan.*

COMPENSATION PLANNING- *Assessment of employment and benefit plan documents and statements, along with guidance on selection strategies.*

BUSINESS - *Business entity planning and setup, plus a basic QuickBooks Online ledger subscription.*

CUSTOM WORK PLAN - *Any additional services outlined in your customized, written work plan that we agree to handle are included.*

The base Client Care Plan is designed to cover the core financial coaching and support most clients need, with flexibility to expand or tailor services to meet your unique goals.

WHAT'S ADDITIONAL

OUT OF SCOPE *- Prior period, unexpected, and time consuming tasks outside of the work plan are not included in basic pricing. Most accounting, bookkeeping, payroll, and benefits plan services are outside the basic care plan.*
RUSH SERVICES *- Fast service is available but not always included in the basic care plan.*
FILING FEES *- Government charges and other fees by third party firms are not included.*

CLIENT RESPONSIBILITIES

COMMUNICATIONS *- Consistently fast, easy, informal two way communication is the key to value of this plan. A response is always expected within 24 hours by phone, text, or email.*
VALUE *- We will stay focused on communicating how you will realize most financial benefit from this service plan and explore other paths and options if the goals and value are not clear.*

PRICE AND BILLING

MONTHLY *- $150 individual, $200 startup solo business, $300 ongoing solo small business, $600 partnership, corporation or nonprofit. The rate is locked in for a year.*
BILLING *- Automatic monthly unless canceled. A slight discount if paid annually.*

CANCELLATION

You can stop this service plan at any time for any reason. We will amend our written work plan to end services. If returning after cancellation, then the balance of the annual fee is required and the monthly fee resumes at the current rate. Canceling and then resuming service is likely to be more expensive than just continuing at a lower monthly rate.

Nantuxent Group Client Service Plan
Services are personally coordinated by Tony Novak, CPA, MBA, MT. Other firms, staff, and contractors may be included as agreed in the work plan. For more information, call or text 856-314-5625.

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