



STAN P. MOORE CPA, PLLC
FINANCIAL 360™

> **What is Select Advantage?**

Membership options for customized services, communication with us, audit protection, and proactive planning

> **How do I pay for my Select Advantage?**

We bill hourly plus an additional monthly membership fee for exclusive access to select services (some FREE!) giving you 100%+ Value in return !

> **What if I don't do anything?**

You will default to the Starter Membership with no monthly fee and limited to services available below

<p>Select Advantage Options (2025 Year)</p> <p>You Pay Monthly Member Fee (1 Year Term) per family + 1 business *</p> <p>(Add-on additional business at 40% Discount)</p>	<i>Starter</i>	<i>Most Popular!</i>	<i>Premium</i>
	<p>No Monthly Fee</p> <p>\$0/Month</p> <p>Member Fee</p>	<p>Valued at \$6,000+ Per Year!</p> <p>\$250/Month</p> <p>Member Fee</p>	<p>Valued at \$14,000+ Per Year!</p> <p>\$500/Month</p> <p>Member Fee</p>
✓ <i>These are services available only to members (hourly rates + member fee)</i>	✓	✓	✓
E-filing Income Tax Returns & electronic notifications	(FREE)	(FREE)	(FREE)
E-signing of e-filed Tax Returns	(FREE)	(FREE)	(FREE)
Client Portal & Mobile App for documents, messaging, and reminders	(FREE)	(FREE)	(FREE)
Convenient Online Tax Questionnaire	(FREE)	(FREE)	(FREE)
Online tax articles blog	(FREE)	(FREE)	(FREE)
Amend & File Tax Returns (returns we prepared)	✓	(FREE) (1 per year)	(FREE) (2 per year)
Tax Return Extensions	✓	(FREE) (2 per year)	(FREE) (2 per year)
Power of Attorney Designation: Draft & filing (covers returns we prepared)		(FREE) (2 per year)	(FREE) (4 per year)
Audit Protection (non-litigation) ** Respond, Resolve, & Appeal US Income Individual Tax return IRS Audits (returns we prepared during membership)		(FREE) (Up to \$4,000)	(FREE) (Up to \$10,000)
Tax Projections: Calculations, Strategy, Virtual Review with you, and send Video Recording		✓	(FREE) (1 Hour)
Custom Tax Extension Calculations: Payment Projections to Minimize Late Penalties		✓	(FREE) (1 Hour)
Children's Tax Return Preparation (18 years old or younger)		✓	(FREE) (Up to 2 per year)
Estimated Tax: Safe Harbor Calculation	✓	✓	(FREE) (1 hour)
Quickbooks Online: Custom Reports Design & Setup		✓	(FREE) (1 hour)
Quickbooks Online: One-Time Custom Setup (Chart of Accounts, Users, Profit Centers, Automation, & syncing)		✓	(FREE) (1 hour)
1099 Preparation, E-filing, & Delivery (PDF & U.S. mail)		✓	✓
Quickbooks Online: 30% Discount off Retail Price Subscription (new setup by us)**		✓	✓
Quickbooks Online: Custom Training Sessions		✓	✓
Resolution of Tax Agency Notices (Non-Audits) (returns we prepared during membership)		✓	✓
Online tax articles blog	✓	✓	✓
Personal Tax Deadline Guarantee *** On Time filing (When all business & personal requests are received 60 days before deadline)		✓	✓
Personal Tax Deadline Guarantee *** On Time filing (When all business & personal requests are received 45 days before deadline)			✓
Passthrough Entity (PTE) Tax Savings Assessment & Safe Harbor Calculations		✓	✓
Passthrough Entity (PTE) Tax Savings Custom Projection Calculations			✓
Tax Payments: Vouchers Provided (you pay tax)	✓	✓	✓
Tax Payments: Online links Provided (you pay tax)		✓	✓
Tax Payments: We make tax payments on your behalf from your account(s)			✓
Estimated Tax: Assist through payroll		✓	✓
Estimated Tax: We make payments on your behalf from your account(s)			✓
Communicate with us by: Email with staff	✓	✓	✓
Communicate with us by: Virtual Meeting or Phone Call with staff (respond weekly)		✓	✓
Communicate with us by: Hotline to CPA Partner & In-Person Meetings with 48 hour response time			✓
Video of Tax Return Review sent to you	✓	✓	✓
Virtual Tax Return Review & Planning with you (30 minutes); Video Sent to you		✓	✓
In-Person Tax Return Review & Planning with you (Up to 2 hours)			✓
Sales Tax Preparation, payment, recording, archiving, & filing			✓
Accounting Services: (Repair Books) Annually during tax preparation	✓	✓	✓
Accounting Services: (Repair Books, Send Analysis Video Recording) Quarterly		✓	✓
Accounting Services: (Repair Books, Virtual Meeting to review with you) Monthly			✓
Accounting Services: (Profit, Cash Flow, and Asset Purchase Planning ZOOM Call)		✓ (Annually)	✓ (Quarterly)

* Fees drafted from checking account on 1st day of each month; Member Fees cover married couples & dependents plus one taxable business entity

**Audit protection is not "insurance" product; covers US IRS Income Tax Return audits for returns prepared during paid membership period(s)

*** Guaranteed, or else monthly membership fee is waived until returns are filed