

**Pro • ac • tive [prōh-ak-tive] -adjective**

**Serving to prepare for, intervene in, or control an expected occurrence or situation, esp. a negative or difficult one: *proactive measures to save tax.***

**If you want to succeed in business and investing, you need *information*.** Information on buyers, information on sellers, and information on inventory. Information to *make* money. And information to *keep* money.

**You rely on your accountant for some of your most important information.** But what does your accountant actually *do* with that information?

**At tax time, your books tell your accountant how much tax you owe.** You scramble for more receipts and more deductions. But by tax time, it's usually too late to do anything more.

**Most accountants do a fine job recording history – the history you give them!** They compile monthly, quarterly, and annual books and records. At tax time, they put the “right” numbers in the right boxes on the right forms, and file them by the right deadlines. But then they call it a day.

**Is that all you *really* want?**

## **Here's How to Beat the IRS. Legally!**

**To minimize your taxes, you need a plan.** You need concepts and strategies that leave more on your bottom line, without raising “red flags” or straying into “gray areas.”

**It doesn't matter how good your current accountant is with a stack of receipts on April 15.** If you haven't planned right, by April 15 it's just too late.

**Have you organized your business right?** Do you have the right benefit plans for yourself and your employees? Do you have the right retirement plan to prepare for your future? Are you taking advantage of *all* the legitimate deductions, credits, loopholes, and strategies the tax code offers?

**My name is Ethan Hundley and I started Hundley Burn, LLC to give clients like you a different kind of service.** We don't just record the history you give us. We go beyond, to give you *proactive* advice and strategies to help you earn more and keep more.

**We partner with businesses throughout the Northern NJ area.** We have the experience -- and more important, the *proactive attitude* -- to give you more than just a history lesson.

**The process starts with your personalized proactive tax plan.** Here's how it works:

- **We start with a brief interview.** I want to hear about where you are now, and where you want to be. I'll ask about your financial, business and investment goals and where your money currently goes. I'll need copies of your past tax return and a little information on each business entity that you manage.

- **I'll prepare your written tax plan.** This process typically takes two weeks so I can research your best possible options.
- **Together, we'll walk through your plan to make sure you understand how to implement it and answer any question.** Typically, this meeting lasts an hour or more. You'll be amazed at the strategies and savings you discover!
- **Where needed, we'll schedule additional meetings or calls** to manage the plan and answer any new questions you may have.

**Once we've developed your plan, the next step is to choose the best maintenance package for your needs:**

Package	Bronze	Silver	Gold	Platinum
<b>Ideal For</b>	Business with entrepreneurial spirit and want to lay a proper foundation for success and savings	Growing businesses looking for more than "just" tax preparation	Growing businesses looking for ongoing guidance and advice	Established businesses looking for our most complete level of service
<b>Business Tax Preparation</b>	✓	✓	✓	✓
<b>Personal Tax Preparation</b>	✓	✓	✓	✓
<b>Phone Consultations</b>	<b>6 per year</b>	<b>12 per year</b>	<b>Unlimited</b>	<b>Unlimited</b>
<b>Due Date Monitoring</b>	✓	✓	✓	✓
<b>Monthly Bookkeeping Review</b>		✓	✓	✓
<b>Monthly Tax Alerts &amp; Form Filings</b>		✓	✓	✓
<b>Tax &amp; Financial Review</b>	<b>Semi-Annual</b>	<b>Quarterly</b>	<b>Monthly</b>	<b>Monthly</b>
<b>Bill Payment Processing + (see below)</b>				✓
<b>Pricing:</b>	<b>Starts at \$2,500/year</b>	<b>\$500/month</b>	<b>\$1,000/month</b>	<b>Starts at \$1,000/month</b>

## “Bronze” Maintenance Package

Our “Bronze” Maintenance Package is designed for new business owners who need help to lay the foundation for their business and achieve their business goals and vision while minimize their taxes. You’ll take advantage of proactive tax strategies that most accountants miss to minimize your taxes. (This alone will pay for our service!) You’ll sleep well knowing we’re doing everything to prevent audits. And you’ll have access to a trusted business advisor to answer pressing financial questions.

1. **Business Tax Preparation.** We’ll prepare your business tax return (proprietorship, partnership, or corporation).
2. **Personal Tax Preparation.** We’ll prepare your federal, state, and local personal tax returns.
3. **Due Date Monitoring.** You’ll get our Due Date Monitoring service to ensure you never miss an important tax deadline again.
4. **Semi-Annual Tax & Financial Review.** You’ll get a mid-year and year-end “sit down” meeting to review your tax picture. We’ll update you with everything you need to know about deductions you can take, anticipating tax roadblocks and opportunities, avoiding IRS audits, and maintaining your tax plan based on your changing circumstances.
5. **Phone Consultations.** You can schedule up to six phone consultations, at your convenience, to address breaking issues and opportunities throughout the year.

## “Silver” Maintenance Package

Our “Silver” Maintenance Package is designed for experienced business owners who realize they need year-round help to maximize their income and minimize their taxes.

1. **Monthly Bookkeeping Review.** We’ll reconcile the books you provide at the end of each month to make sure they’re clean and up-to-date. This will help ensure you know where you stand regularly to achieve goals you set in your business, as well as allowing us to help you plan effectively for tax time.
2. **Tax Alerts.** You’ll get our weekly email alerts and monthly newsletter with timely tips for making the most of your money. We’ll also file your monthly state Sales Tax!
3. **Phone Consultations.** You can schedule up to twelve phone consultations, at your convenience, to address breaking issues and opportunities throughout the year.
4. **Quarterly Tax & Financial Review.** You receive the same information from us in your Semi-Annual Tax & Financial Review, now quarterly!

## “Gold” Maintenance Package

Our “Gold” Maintenance Package is designed for successful business owners who realize they need year-round help to maximize their income and minimize their taxes. You get these ongoing services in addition to those offered in our “Silver” package:

1. **Unlimited Phone Consultations.** You can call us anytime to schedule a phone consultation, at your convenience, to address breaking issues and opportunities throughout the year.
2. **Monthly Tax & Financial Review.** We’ll provide you with the same review you receive each quarter in our Silver package, now each MONTH! You receive a monthly face to face call or meeting with ME, Ethan J Hundley, CPA and your Certified Tax Coach to listen to your goals and review your current business strategies for optimal tax savings and financial well-being!

## “Platinum” Maintenance Package

The “Platinum” Maintenance Package is designed for successful businesses in “Gold” in addition to the following services if you’d prefer for us to automate your entire accounting processes for you:

1. **Bill Payment Processing.** We’ll provide you with technology, tools and support to effectively help you automate the process of paying your bills. We will establish a process to receive your bills and send a list to you to view your bills and approve for timely payment by our firm on your behalf.
2. **Document Automation.** We will provide you with tools to automate and track your debit and credit card transactions, along with cash receipts to ensure they are included in your books timely and properly!
3. **Audit Protection.** We will represent you and your firm in case of government examination for the most optimal outcome. This will allow you to sleep better at night knowing your trusted advisors are there for you when IRS or State agencies come knocking!

Feel free to call us at 973-940-0175 to schedule your complimentary mini tax review. We’ll find the mistakes and missed opportunities that may be costing you thousands of dollars per year, then show you how to craft a plan to cure them.

Ethan J. Hundley, CPA, CTC  
Chief Tax & Accounting Officer  
Hundley Burn, LLC