



4 West Winter Street • Delaware, OH 43015  
(740) 513-7968

[www.northpointfinancialplanning.com](http://www.northpointfinancialplanning.com)

6416 Sable Ln • Greensboro, NC 27406  
(336) 580-7887

## **TAX PLANNING and PREPARATION SERVICES**

**NorthPoint Financial Planning, LLC** ("NorthPoint") is pleased to offer tax planning, preparation and filing services powered by **Core Accounting Group Solutions, LLC** ("Core").

Proper tax planning and return preparation is an important part of a sound financial plan. Together with Core, NorthPoint will offer tax planning and return filing services. Now, more than ever, let NorthPoint Financial Planning be your guide!

Tax Planning Service includes:

- Tailored analysis supported by **Holistiplan®**. This efficient income tax analysis tool automates key calculations, uncovers actionable planning opportunities, and provides projections when comparing strategies.

### o Tax Report with Key Metrics

This screenshot displays a detailed tax report with various sections including 'Key Metrics', 'Tax Calculations', and 'Projections'. It features a mix of text, tables, and highlighted areas to present complex financial data in an organized manner.

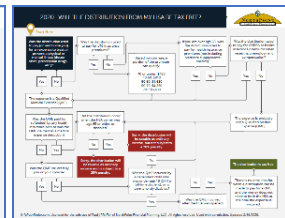
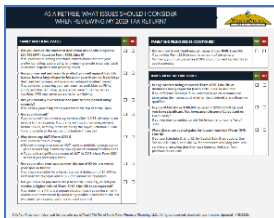
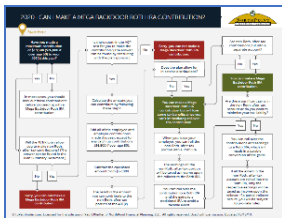
This screenshot shows another section of the tax report, focusing on specific calculations and projections. It includes tables with numerical data and explanatory text for each section.

### o Scenario Analysis

This screenshot illustrates a scenario analysis report, which compares different financial outcomes based on varying assumptions. It includes multiple columns for different scenarios and rows for various financial metrics.

This screenshot shows another part of the scenario analysis report, providing further details on the financial projections and the impact of different scenarios.

- Access to **CompassGUIDES**. These 2-page guides provide specialized information, flow charts or checklists to assist clients and their advisors in navigating complex financial and tax-related issues.
  - o Easy to follow guidance by selecting from over 50 specialized flowcharts, decision trees or checklists



Income Tax Return Preparation and Electronic Filing:

- Annual Income Tax return preparation and filing from **Core Accounting Group Solutions, LLC**.



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## 2021 TAX PLANNING FEE SCHEDULE

### Annual Income Tax Planning

**\$175**

Analysis and projections of year-end personal income tax liability and recommendations to potentially reduce the amount of taxes owed. Implications of withholdings, elective deferrals, pension/social security/retirement plan income, deductions and tax credits will be considered, and specific action steps recommended.

### Upgrade Services (Select all that apply)

#### Individual/Joint Standard Returns:

- |  |           |
|--|-----------|
| <input type="checkbox"/> Federal (Form 1040), one State return and filing fees | \$120     |
| <input type="checkbox"/> Itemized Personal Expenses                            | add \$75  |
| <input type="checkbox"/> Schedule C (Business Income)                          | add \$75  |
| <input type="checkbox"/> Schedule E (Rental Income)                            | add \$150 |
| <input type="checkbox"/> Additional State Filing                               | add \$115 |

#### Business Returns: Includes Form 1040, one State return and filing fees

- |   |         |
|---|---------|
| <input type="checkbox"/> Partnership (Form 1065)                                    | \$950   |
| <input type="checkbox"/> Corporation, S-Corp, Non-Profit (Forms 1120, 1120S or 990) | \$1,400 |

#### Special Cases: Includes filing fees

- |   |            |
|---|------------|
| <input type="checkbox"/> Like-Kind Exchanges (Form 882)                     | \$300      |
| <input type="checkbox"/> Change in Accounting Method (Form 3115)            | \$400      |
| <input type="checkbox"/> Gifts (Form 709)                                   | \$500      |
| <input type="checkbox"/> Domestic Estates and Trusts (Form 1041)            | \$600      |
| <input type="checkbox"/> Amendments (All Forms)                             | \$175/hour |
| <input type="checkbox"/> Extensions (Individual, Joint, or Business Return) | \$80       |

#### Complexity Rate

NOTE: All returns are subject to complexity rate; determination of complexity may be made after initial receipt of client documentation. **\$175/hour**

#### Income Tax Filing Audit Assurance Plan **\$65**

- ☐ The Income Tax Filing Audit Assurance Plan will ease the burden placed on you if your return is audited and helps shield you from unexpected costs. NorthPoint Financial Planning, LLC has arranged for the following services to be provided by the tax filing preparer upon filing of your annual income tax return:
- Initial consultation to review the audit circumstance and determine the course of action
  - Response to written notices from federal or state taxing authorities



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- The first two hours of audit representation included at no additional charge. Additional hours will be billed at the regular rate of \$175/hour (Value: \$350)
- Additional copies of your tax return will be provided upon request at no extra cost to you
- Income verification letters provided upon request at no additional cost to you.
- Additional communications (emails, phone calls, etc.) charges will be waived during the audit process.
- If it is determined that penalties and interest are assessed as a result of a preparation error on the part of the tax filing preparer, the preparer will pay those penalties and interest on your behalf.
- **This protection becomes effective upon filing your annual Form 1040 and continues through one year of your filing date.**

Start your tax planning subscription today and make informed decisions throughout the year.

#### About Paul J. Pfeiffer, CFP™ and NorthPoint Financial Planning, LLC

Paul J. Pfeiffer, MBA, Certified Financial Planner™ is a Fee-Only Fiduciary and Investment Advisor providing wholistic financial planning and investment management powered by the CompassView Wealth Management Process since 2009.

Serving individuals, families and businesses in and around Delaware, Ohio and Greensboro, North Carolina. NorthPoint Financial Planning, LLC fosters lasting relationships based on mutual trust and integrity and maintains an active, positive role in local communities.

Learn more at [www.northpointfinancialplanning.com](http://www.northpointfinancialplanning.com)

#### About Chris Halmbacher, CPA and Core Accounting Group Solutions, LLC

Chris Halmbacher, CPA, and Core Accounting Group Solutions LLC (Core), a registered accounting firm, provides tax preparation and corporate analytics to individuals and small businesses in Columbus, Ohio and surrounding areas. Striving to provide accurate returns, encompassing a variety of unique tax situations has allowed Core to become a trusted partner with strong relationships to the clients and neighborhoods we serve.

Learn more at <https://cagsolutionsllc.com/tax-services>