


Soulence Philosophy

We understand that you want to keep as much of your hard earned income as possible, and we're here to make sure that happens. Too many taxpaying Americans are paying unnecessary taxes. Not because the government is taxing them too much, but because taxpayers are not getting proper advice from their tax accountants. The tax laws created by the government are out of your control. Fortunately, **proper tax planning and utilizing what is available to lower your taxes is in your control.**

Many tax preparation firms treat you like a number. They want to do minimal work for maximum pay without worrying about the individual or their circumstances. **Here at Soulence, we focus on you, the client, first because your needs and circumstances are unique.** At Soulence we promise you will be treated and cared for as an individual. By looking closely at your individual needs, we ensure that your finances are in proper order for your circumstances.

We believe that when your taxes and accounting are approached proactively, both can become a resource for you to improve your financial situation. This means that as tax professionals, **we make sure to give you a complete view of your situation, so you can take advantage of every possible circumstance in your finances and life.** By asking you questions, and treating you as our greatest asset instead of just a revenue stream, we are able to use your tax return and tax structure to help achieve your goals.



www.soulence.com

Contact Soulence

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CFO Enrollment Program

Toll Free: 888.400.4236

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CFO Enrollment Program

Our CFO Enrollment Program is designed to build your financial foundation by

1. Maximizing your liability protection
2. Minimizing your taxes to the extent you want them minimized

Our program has 4 levels of service. Normal cost reflects the expense other tax and accounting firms would charge.



Service	BRONZE	SILVER	GOLD	PLATINUM	Normal Cost
Monthly Fee (Charged to credit or debit card)	\$30	\$80	\$200	\$350	N/A
Yearly Cost (Priced at savings/month)	\$300	\$800	\$1900	\$3800	N/A
Electronic Newsletter	Yes	Yes	Yes	Yes	N/A
Podcasts (In depth tax topics)	Yes	Yes	Yes	Yes	N/A
Unlimited Email Correspondence	Yes	Yes	Yes	Yes	\$200/hour
CFO Meetings	1	2	3	3	\$500/meeting
Unlimited Phone Consultation	X	Yes	Yes	Yes	\$200/hour
Year End Tax Meeting/Planning	X	Yes	Yes	Yes	\$185
QuickBooks Training	X	1 per year	up to 5 per year	unlimited	\$75/hour
Maximization Map (Entity ownership & cash flow)	X	X	Yes	Yes	\$150/hour
Individual Return (\$200 off 1040 tax form)	X	X	Yes	Yes	\$200 and up
Quarterly Face to Face Consulting	X	X	Yes	Yes	\$100/quarter
Monthly Face to Face Consulting	X	X	X	Yes	\$200/month
Audit Representation (We will represent you)	X	X	Up to \$2,500	Up to \$5,000	\$2,500 - \$5,000
Entity Tax Prep (\$300 off business return bill)	X	X	X	Yes	\$300 and up
Discount Percent on All Other Services	5%	10%	15%	20%	Exclusive for CFO
Average Annual Savings	\$1,000	\$2,000	\$4,000	\$6,000	