



# MID-YEAR STRATEGIC BUSINESS REVIEW

A Dedicated Advisory Session for Business Owners & Rental Property Investors

**Your tax appointment answered last year's questions. This session answers this year's.**

Most of the important conversations we have with business owners and investors happen right after tax season — when you're thinking about where things are headed and what needs to change. The Mid-Year Strategic Review gives those conversations the time, structure, and preparation they deserve — while there's still runway left in the year to act on them.

## WHAT WE COVER IN YOUR SESSION

- |                                                |                                                        |                                                            |
|------------------------------------------------|--------------------------------------------------------|------------------------------------------------------------|
| ✓ Year-to-date revenue & expense review.       | ✓ Full-year tax liability projection (proforma).       | ✓ Quarterly estimated tax payment adjustments.             |
| ✓ Entity structure analysis & recommendations. | ✓ Asset protection guidance                            | ✓ Owner compensation & reasonable salary review            |
| ✓ Retirement contribution strategy             | ✓ Capital gains & disposition planning (if applicable) | ✓ Written summary or advisory memo delivered after session |



## CHOOSE YOUR SESSION LEVEL

### THE PULSE CHECK 60-Minute Session

**\$350 – \$450**

**Best for:** Stable businesses wanting a solid mid-year read

- YTD review & proforma tax estimate.
- Quarterly payment guidance.
- 2–3 prioritized action items.
- Written summary.
- One follow-up email exchange.

### THE STRATEGIC REVIEW 90-Minute Session

**\$650 – \$850**

**Best for:** Stable businesses wanting a solid mid-year read

**Everything in Pulse Check, plus:**

- Entity structure analysis
- Asset protection review
- Owner compensation strategy
- Written action plan
- One follow-up call or 2 email exchanges

### THE GROWTH ADVISORY Up to 2-Hour Session

**\$1,200 – \$1,800**

**Best for:** Stable businesses wanting a solid mid-year read

**Everything in Strategic Review, plus:**

- Multi-entity income flow analysis
- Capital gains & disposition planning
- Full advisory memo
- 90-day follow-up access

## OPTIONAL ADD-ONS

**\$300–\$500**

S-Corp Election Analysis & Filing Coordination

**\$150–\$250**

Additional Entity Review (each entity beyond first)

**\$150–\$300**

Proforma P&L Build (if books are not current)

**+\$150 flat**

Rush Scheduling (May appointment)

### Sessions available June – August

**50%** deposit required at booking.

Limited spots available Not sure which tier is right for you?

Reach out and we'll help you find the right fit — no charge for that conversation.



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