



**Daisy Jacobson**

Accounting, Tax & Financial Strategies



**We deliver quality solutions to make  
you and your business thrive.**

At Daisy Jacobson Accounting we provide customized financial solutions to support businesses at every stage. Our Monthly Subscription Bundles simplify financial management, save up to 10%, and are tailored to your needs. More than just numbers, we focus on building long-term partnerships for peace of mind and proactive support.

## **Why Are We Doing This?**

We believe that financial success isn't just about tax season – it's about being with you every step of the way. With these new subscription bundles, we're giving you:



**Year-Round Support:** Because your finances don't take a break, and neither do we.



**Simplicity:** One predictable monthly payment for all the services you need.



**Savings:** Up to 10% off, plus peace of mind knowing we've got you covered.



**A Vision for the Future:** We're growing with you, evolving to better serve you in the long run.

## **Our Services**

**For  
Individuals**

- » Tax Preparation (**Starting at \$550**)
- » Tax & Financial Strategy Sessions (**\$700 per session**)
  - Tailored guidance to save money and plan for your goals.
- » Financial Reviews (**\$500 per session**)
  - A proactive approach to managing your finances – recommended twice a year.

**We're Here for YOU!**

## For Business

- » Tax Preparation (Business + Personal) (*Starting at \$2,250 annually*)
- » Payroll Services (*Starting at \$200/month or \$2,400 annually*)
  - Hassle-free payroll for your team.
- » Bookkeeping (*\$175/hour or \$500/month starting at 3 hours*)
- » Annual Report Filing (*\$200 annually*)
- » Business Consulting Sessions (*\$500 per session*)

## Additional Services

We're here for all your needs, big or small. Add these to your bundle and save 10%:

- » **IRS Representation:** \$500/hour – We'll handle audits or disputes with confidence.
- » **Business Formation:** \$1,500 – Professional setup for your new venture.
- » **On-Demand Bookkeeping:** \$175/hour – Flexible support tailored to your needs.

## How Does it Works?

- **Pick 3 or More Services:** Tailor your bundle to your exact needs.
- **Subscribe Monthly:** Enjoy the convenience of predictable payments.
- **Save Up to 10%:** Bundles and add-ons are all discounted for subscribers.
- **Relax with Year-Round Support:** Know we're here whenever you need us.

## Example Bundle Savings

### Individuals

- » Tax Preparation (\$550 annually)
- » Two Tax & Financial Strategy Sessions (\$1,400 annually)
- » Two Financial Reviews (\$1,000 annually)

**Annual Cost: \$2,950**

**You Pay (Monthly): \$221.25/month**

### Business

- » Business Tax Preparation (\$2,250 annually)
- » Payroll Services for 5 employees (\$2,400 annually)
- » Bookkeeping (10 hours/year at \$175/hour = \$1,750 annually)
- » Two Business Consulting Sessions (\$1,000 annually)

**Annual Cost: \$7,400**

**You Pay (Monthly): \$555/month**

**SPECIAL  
OFFER**

Sign up for your bundle by  
Feb 28. Receive a FREE bonus  
consultation (Value: \$500)

These subscription bundles are our way of evolving to meet your needs and building a better future together.

## Let's Build Your Perfect Bundle!



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Let's make this the year we take the stress out of finances and empower you to focus on what truly matters.