

Tax Advisors of Cary

Business Packages

At Cary Tax, we're here to help you navigate that landscape with ease and confidence. Our Business Service Packages are designed to provide you with the essential tools and expert support needed to manage your business.

Package Features	Business First Package	Premier Package	Concierge Package
Monthly Bookkeeping	Not Included	Included	Included
Fixed Asset & Loan Amortization Schedules	Basic	Integrated into Books	Integrated into Books
Ownership Basis Tracking	Included	Included	Included
Tax Return Preparation	1 Federal, 1 State	1 Federal, 2 States	1 Federal, 5 States
1099 Preparation	Not Included	Up to 10 Forms	Up to 20 Forms
Estimated Tax Vouchers	Based on Prior Year	Includes Q4 "True Up"	Real-Time Payments for Q2-Q4
After Tax Season Support	1 Hour	2 Hours + 1 Planning Meeting	5 Hours + Planning Meetings
Priority Access	Not Included	Not Included	Private Priority Phone / Email
Pricing	\$200 Per Month	\$500 Per Month	\$800 Per Month

This package is perfect for small businesses needing foundational financial management.

This package is best suited for businesses that need regular bookkeeping and advanced tax preparation.

This package is best for businesses requiring ongoing, high-level financial oversight and customized support.