

Gulf Island Accounting & TaxTM

Personal Financial Services Packages

\$250 - \$450/month*

Comprehensive professional financial services for all your accounting, tax, and financial needs. Let us help you take care of the challenges, responsibilities, and decisions you face every day, each month, one time a year, or once a lifetime.

Personal Financial Services Packages include assistance with -

- Identification & Implementation of Tax Reduction Strategies
- Personal Tax Return Preparation
- Bookkeeping & Bill Payment
- Personal Document Management & Safekeeping
- Fraud Reduction Programs
- Financial Coaching & Mentoring
- Personal Financial Statements
- Investment Expense Analysis & Recommendations
- Retirement Benefit Selection
- Personal Financial Plans
- Personal Business Transition Plans
- Ongoing Every-Day Financial Advice, Q&A, and Decision Support



Bart Zautcke

**CPA, CMA, CFM,
CGMA, MAcc**

Call For Your Free Initial Consultation

25+ Years Experience

Locally Owned & Operated

*Fee range applies to individuals/couples with up to \$500K in annual taxable income. Paid monthly in advance. Contract required. Subject to new client approval. Services delivered on an ongoing basis based on client priorities and filing deadlines.

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