

# Tax Planning and Preparation

Practice owners and physicians throughout the country depend on the advice and direction of our tax consultants. MedTax professionals draw on the most current tax laws and software technology to manage your federal and state tax obligations. And we stay connected. Frequent contact with you keeps your personal, practice operations, and transactions structured with advantageous tax positioning. Our proactive approach sets us apart. We define your expectations upfront with a tailored engagement letter and service quote. In addition to providing ongoing tax advice, we offer a number of specific tax services.

## *Residents and Fellows*

- Annual Tax Organizer
- Individual Federal & State Tax Return Preparation
- Electronic Filing

**Annual Retainer \$225**

## *Premier Level*

- Annual Tax Organizer
- Individual Federal & State Tax Return Preparation
- Withholding Advice
- Electronic Filing

**Annual Retainer \$500**

## *Elite Level*

- Annual Tax Organizer
- Individual Federal & State Tax Return Preparation
- Quarterly Estimates
- Electronic Filing
- Withholding Advice
- Tax Projections
- Ongoing Tax Consultation & Updates

**Annual Retainer \$800**

## *Signature Level*

- Annual Tax Organizer
- Individual and Business Federal & State Tax Return Preparation
- Quarterly Estimates
- Withholding Advice
- Tax Projections
- Ongoing Tax Consultation and Updates
- Practice Returns
- Business Consulting
- Year End Accounting Support

**Annual Retainer Range from \$1,200-\$6,000**

**MedTax Inc.**  
The Physician's Specialist

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