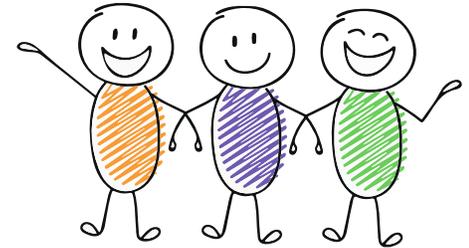


Elevate RIA Tax Solutions

Providing white label tax services for your clients



Leverage the knowledge of our seasoned professional tax team under your brand. To start, simply select the service and complexity level needed:



Service Level	Back office preparation*	Back office + Quality Control	All-Inclusive**
Preparation	Yes	Yes	Yes
Workpapers	No	Yes	Yes
Review Quality Control	No	Yes	Yes
Signing Return	No	Yes	Yes
Document collection/management	No	No	Yes
Delivery of Tax Return to client	No	No	Yes
Training/education	No	Yes	Yes

* Subject to ECG determining RIA has proper quality control and review capability.

** All Inclusive requires a minimum of 100 returns or an additional fee applies.

Complexity Level	1	2***	3***	4***
W-2	Unlimited	Unlimited	Unlimited	Unlimited
1099-INT, 1099-DIV, 1099-B, 1099-Cons	3	Unlimited	Unlimited	Unlimited
1099-R and 1099-SSA	4	Unlimited	Unlimited	Unlimited
Schedule A/above the line deductions	No	Yes	Yes	Yes
Schedule C	No	No	No	1
Rental Properties	No	No	1	4
K-1s	No	No	2	6
State Returns	1	1	1	2
Safe Harbor Estimated tax vouchers	Yes	Yes	Yes	Yes

*** Some investments may require additional forms or disclosures that require an additional fee.

Taxes are inevitable for everyone - give your clients the tax services they require and want from their trusted investment professional!

Contact our team for ERTS pricing that provides the back office to simplify and manage your firm's tax practice efficiently and cost effectively!



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