Wealth Enhancement Tax & Consulting Services

Tax Planning That Goes Beyond the Tax Return

We believe tax preparation is only part of the equation. The Wealth Enhancement Tax & Consulting Services (WETCS) enhanced service model combines tax return preparation, proactive planning, and collaboration with your Financial Advisor to help identify opportunities throughout the year and create greater after-tax value.

Why Clients Choose WETCS
Tax Preparation + Tax Planning + Financial Advisor Collaboration

Many tax preparers focus on filing returns. WETCS helps clients evaluate opportunities throughout the year through a coordinated approach that integrates tax planning with broader financial goals.

The WETCS Experience

From Reactive Tax Preparation to Proactive Tax Planning

What Makes WETCS Different?

Unlike traditional tax preparation that focuses on filing season, WETCS is designed to provide value throughout the year.

- **January – October:** Tax return preparation & filing
- **May – October:** Prior-year tax assessment & planning discussion
- **July – December:** Personalized tax planning analysis
- **Year-Round:** Advisor collaboration & tax guidance
- **As Needed:** Tax planning for life events and financial decisions



Comprehensive Prior-Year Assessment

Easy-to-understand client tax report card.



Customized Tax Planning

Additional two hours of tax planning based on client specific needs.



Advisor Collaboration

Tax and financial advisors coordinate client context and tax impact.



Personalized Tax Planning Analysis

Forward-looking current & future year analysis.



Tax Return Preparation

Full 1040 preparation and filing.



Client Q&A & Assistance

Year-round tax advisor access at no charge*.

Dedicated Tax Advisor for Clients and Financial Advisors

*A separately priced project will be required if more than 30 minutes of research, analysis or a new deliverable is needed.

Who Benefits Most?

WETCS may be a good fit if you:

- Value proactive tax planning.
- Want your tax and financial advisors working together.
- Have significant investments or multiple income sources.
- Own a business, rental property, trust, or partnership interest.
- Anticipate retirement or major financial decisions.
- Prefer a dedicated tax advisor relationship rather than transactional tax preparation.

> "I have to tell you that my WETCS Tax Advisor has been nothing short of awesome… He did a really impressive job cleaning up my prior mess… I'm impressed—and that's not easy!"
>
> – Keith, WETCS Client.
> Actual client testimony. Client was not compensated.

WETCS Tax Services

Individual Tax

- Tax Return Preparation and Planning (Federal and State)
- Safe Harbor Estimated Tax and Withholding Guidance
- Customized Tax Planning, not limited to:
  - Roth Conversion Analysis
  - Charitable Giving Planning
  - Retirement Account Recommendations
  - Retirement Contribution Optimization
  - Tax Loss Harvesting
- Audit Assistance

Trust Tax

- Tax Return Preparation and Planning (Federal and State)
- Charitable Remainder Trusts Preparation
- Trust Distribution Recommendations
- Trust Tax Planning Strategies
- Audit Assistance

Estate and Gift Tax

- Gift Tax Return Preparation (Form 709)
- Gift Planning (including annual exclusion gifts, 529 funding strategies, and family gifting opportunities)
- Estate Income Tax Return Preparation (Form 1041)

Business Tax

- S Corp, LLC, Sole Proprietorship, Partnership, and C Corp Tax Preparation and Planning (Federal and State)
- Entity Type Planning (Example: LLC to S Corporation)
- Business Owner Retirement Tax and Contribution Strategies
- Audit Assistance

> What a great CPA my WETCS Tax Advisor is. He is patient, brilliant, and super helpful. He is such a great addition to my team. He makes things easy and understandable, and we totally trust him.
>
> – Mike, WETCS Client
> Actual client testimony. Client was not compensated.

Talk with your Financial Advisor to learn about pricing and if WETCS is the right option for you.