STEVENS GROUP
CPAs & WEALTH COACHES

Thank you for considering Stevens Group CPAs & Wealth Coaches. As a tax professional & wealth coach, I want to assure you that we carefully review each client's information to determine if we are a good fit. This process allows both parties to make an informed decision about moving forward with our services, as we do not accept every client who contacts us.

How to become a client: Please complete the intake questionnaire online and hit submit to send it to us. After we review the paperwork, we will set up a 30-minute phone call to discuss your information in more detail. Following our initial conversation, we will gather tax returns and other information to create a customized proposal tailored to fit your needs. This proposal will be reviewed during a second meeting.

Our Niche: We specialize in annual tax planning, transactional tax planning, succession tax planning, retirement cash flow planning and wealth coaching. Additionally, we provide education to empower clients in their daily business operations, helping them reach their full potential and implement the knowledge they gain by being more tax efficient.

Good client fit: Generally, we do not take on clients to just do tax preparation. We engage in a full tax planning relationship. We provide tax preparation for our clients, but it is more of a comprehensive part of the tax advisory engagement our clients have with us. We are looking for clients that value working with a professional, so they have more time to run their business. If you are a DIY and looking for a quick tax return filing, then you may not be a good fit for our more in-depth services. If you value a CPA and want more proactive tax planning, education, and customer service, then we are probably what you have been looking for.

Pricing: All our pricing is typically going to be set as a pre-determined fixed fee. Our minimum price for Individual returns is $1,000.00 (*minimums do not apply to Investment clients who are managed by Stevens Group Wealth Coaches*) and our minimum price for Business returns is $3,000.00. Any fee quoted will be contingent on what value and solutions we can provide you with. To determine the scope of what is needed, a tax assessment is performed and upon the completion of that assessment, we will provide you with a written fee quote.

Quality (tax efficiency & customer service) vs. Quantity (as many clients as we can find): We are a quality-based firm with robust processes, procedures, and systems in place to deliver high-quality results and exceptional customer service for your financial needs. Throughout our partnership, you will collaborate with multiple experts within our company. Our meticulous process involves three individual tax professionals reviewing your returns to ensure top-notch quality and no missed opportunities. While this thorough approach may slow down the process, it ensures accuracy. Unlike relying solely on one CPA, our group approach guarantees continuity and quality, so you are never left unsupported.

NOTICE: Stevens Group CPAs is under no obligation to provide services to you until a Proposal for Professional Services has been agreed upon by our office and the potential client.

Stevensgroupcpas.com
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