

Groen, CPA LLC

A GUIDE FOR PROSPECTIVE CLIENTS

Not every CPA is right for every client, and not every client is right for every CPA. This short guide is meant to help you decide whether we are the right fit — before you invest the time to book a consultation.

Who we work best with

- Individuals and families with returns that go beyond a simple W-2 — homeowners, itemized filers, K-1 recipients, or households with a rental property or investment activity.
- Self-employed individuals, freelancers, and 1099 contractors with Schedule C income.
- Small business owners running S-Corporations, partnerships, or LLCs — for annual returns, bookkeeping, and year-round support.
- Clients who value working with a licensed CPA rather than a seasonal preparer, who want direct access to the person preparing their return, and who prefer plain English over jargon.

Who might be better served elsewhere

Honesty upfront saves everyone time. You may be better served by another provider if:

- Your priority is the cheapest option available.
- You need a refund advance loan or "instant refund" product. We do not offer either.
- You have complex international tax matters — expatriate returns, foreign entity income, or non-resident alien filings.
- Your business is a C-Corporation, operate in many states with significant multi-state apportionment, or file in states such as California.
- You expect weekend availability or same-day text responses year-round. We work efficiently, but not instantly.

What we do

Individual tax returns (Form 1040). Self-employed and Schedule C. Small business returns (S-Corporation 1120-S and partnership 1065). Bookkeeping on a monthly recurring basis. Tax advisory and planning across three tiers — from ongoing guidance to formal written engagements. A full fee schedule is available on request.

How much we cost

Individual returns start at \$350 for a simple W-2 filing and typically run \$650 to \$1,000 for self-employed and itemized filers. Business returns run \$1,500 to \$2,500 for standard engagements. Monthly bookkeeping ranges from \$250 to \$1,000 depending on volume. Advisory engagements start with a \$500

annual retainer for general guidance and go up to \$3,500 for full project work with written deliverables. Every quote is confirmed in writing through an engagement letter before work begins.

Our process

- 1.** Book a free 15-minute consult through our online scheduler. We use the time to understand your situation and answer any questions.
- 2.** If we are a fit, we send an engagement letter defining the scope of work, deliverables, and fee.
- 3.** You sign the engagement letter. Individual returns pay at delivery and business returns pay a 50% retainer and the remaining at delivery.
- 4.** You provide source documents through our secure client portal.
- 5.** We prepare and review the return or advisory deliverable.
- 6.** You review, approve, and pay the balance.
- 7.** We e-file with the Internal Revenue Service and any applicable state agencies, and deliver a final packaged copy for your records.

How to get started

Book a consult: calendly.com/skyler-groencpa/booking

Email: contact@groencpa.com

Website: groencpa.com

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