



Our Mission

Founded in 2019, XY Tax Solutions (XYTS) provides tax planning and preparation services to fee-for-service financial advisors and their clients. We make this possible by offering outsourced tax services at competitive rates.

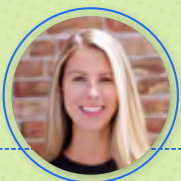
Why XYTS?

We exist to create experiences where fiduciary financial advisors can dedicate their time, energy, and efforts to doing what they love most—serving their clients.

Your advisor understands your financial goals. That's exactly why they're part of our tax team.

OUR TEAM

Your advisor has access to a dedicated tax team with over 60 years of combined tax planning and preparation experience.



EMILY PURDON, CFP®, EA
SENIOR DIRECTOR

SAM NGUYEN, CFP®, EA
DIRECTOR OF TAX



PAM HOCEVAR, EA
DIRECTOR OF TAX

NICOLE MCCOWN, CPA
DIRECTOR OF TAX



DAN RITTER JR, CPA
TAX MANAGER

KATRINA IVANCIC, CPA
TAX MANAGER



SARA WILLIAMS
OPERATIONS MANAGER

CASSIE JACKSON
OPERATIONS SPECIALIST



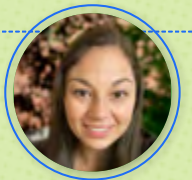
BLAKE MATTFELDT
TAX SPECIALIST

RACHEL BLACK
TAX SPECIALIST



CHELSEY PATERA
TAX SPECIALIST

KAITLIN ANGEL
TAX SPECIALIST



WHAT WE DO

XYTS delivers expert tax planning and preparation services to 220+ advisors and their clients—and counting!

TAX PREP

A **Premier** engagement is a relationship between you, your financial advisor, and XYTS.

Our most popular option, a Premier engagement is a relationship between you, your advisor, and XYTS. XYTS will copy your advisor on any email interactions and requests. Additionally, your advisor will get access to your secure portals.

XYTS will bill you through our secure client portal. You can remit payment via ACH or credit card.



OUR STRENGTHS

- Expert team—more than 60 combined years!
- Complete transparency
 - Competitive pricing
 - Tech-focused

SOME *of our* SPECIALTIES

- › Small business taxes
- › Real estate and rental properties
 - › Incentive Stock Compensation
 - › Charitable giving
 - › 1031 exchanges

TAX PLANNING

XYTS is available to consult on tax planning issues, conduct tax research, and answer tax questions for a flat \$250/hour rate.

These services can be held in conjunction with tax preparation services or as a separate engagement.

OUR PROCESS



PRICING

INDIVIDUAL TAX RETURN

STARTING AT \$350

1040 / Individual Income Tax Return

The following forms are included in the base return price:

Schedule A / Itemized Deductions

Schedule B / Interest & Dividends

Schedule D / Capital Gains & Losses

1040-ES / Estimated Taxes (Safe Harbor)

Deposits are \$100 per return.

TRUST TAX RETURN

STARTING AT \$600

Form 1041 / Tax Return for Estates & Trusts

Deposits for trust returns are \$120 per return.

BUSINESS TAX RETURN

STARTING AT \$900

The following forms are included in the base return price:

Form 1065 / Partnership

Form 990 / Organization Exempt from Income Tax

Form 1120-S / S Corporation

Form 1120 / Corporation

