COMPLETE INCOME TAX AND FINANCIAL SERVICES

SERVICES AND FEES

We are different from other CPA firms. They are "fee for service", which means they provide a service, you pay, the end, until such a time you need something else. It's a transactional business model. We believe in a relationship business model. We charge a flat annual fee of $1,000 a year for most clients at the time the tax return is prepared. That covers all of our planning and consulting services for your family. The only service that isn't covered is asset management.

MASON FINANCIAL SERVICES
REGISTERED INVESTMENT ADVISOR
CERTIFIED PUBLIC ACCOUNTANT

THE SERVICES THE FLAT FEE COVERS

INCOME TAX PREPARATION

The individual tax return which includes the 1040, 540 and all supporting forms and schedules. There may be additional costs if there is more than one business or rental activity.

AUDIT PROTECTION

If you get audited, we go for you. We'll assist you in assembling required documentation and represent you in the audit.

IRS/FTB LETTER SUPPORT

If you ever get a letter, we handle it for you. We will call the IRS or state on your behalf and solve the problem.

TAX PLANNING

There are countless strategies for reducing your tax burden, but most of them require doing something. We work with you to structure things in the most tax efficient manner.

RETIREMENT PLANNING

Most people who save for retirement have no idea if they're saving enough or what kind of cashflow they can expect in retirement. We create customized retirement plans and update them annually so you can see if you're on course to meet your goals or if you need more work.

FINANCIAL PLANNING

There are many aspects to our financial lives - insurance, taxes, retirement, investments, estate planning and trusts - the list goes on. We help you bring everything together to make the best choices for your family's future.

EMPLOYER RETIREMENT PLAN INVESTMENT SELECTION

Many who have an employer retirement plan don't know how to select their investments and there is little or no help at work. We look through your investment selections along with what is available and make recommendations based on the markets and the economy combined with your personal risk tolerance and feelings about investments.

ensenmasoncpa.com

Ensen Mason is both a licensed accountant (CPA) and investment advisor (CFA & IAR). Since starting his practice in 1988, he has personally prepared over 10,000 income tax returns. Between the various investment roles he has, he personally manages or oversees $25 billion in investment assets. Mr. Mason prides himself on personally knowing his client's unique financial situation intimately so he can provide the advice that gives his clients the best outcome. He understands each family's situation is different and no one product or solution is right for everybody.

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MASON FINANCIAL SERVICES

REGISTERED INVESTMENT ADVISOR
CERTIFIED PUBLIC ACCOUNTANT

FULL SERVICE FINANCIAL & TAX SERVICES