

TAX SEASON

ADD-ONS



Option 1 | Safe Harbor Estimates - \$50

Includes:

- Safe Harbor Estimates - quarterly payment amounts based on your prior return.
- Email reminders before each estimated tax deadline.



Ideal for clients who want penalty protection without a full projection.

Option 2 | Vivify Tax Scorecard - \$200

Includes:

- Vivify's Tax Scorecard, a post-filing analysis of the return Vivify just prepared for you.



The Scorecard highlights how you're currently using tax-saving strategies, uncovers opportunities to improve, and gives you clear next steps to move forward with confidence.

Option 3 | Tax Projection, Withholding & Payment Assistance - \$550

Includes:

- A projection of your 2027 tax liability based on your estimated income.
- Personalized recommendations for adjusting your withholding or making quarterly estimated payments.



Ideal for clients whose income goes beyond a regular paycheck (equity comp, investments, and similar), whose income is changing materially, or who simply want to know their approximate tax bill before filing season arrives.