

# 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 | Vivify Year-Round - \$1,500

Includes:

- Vivify's Tax Scorecard, a post-filing analysis of the return Vivify just prepared for you
- Tax projection + payment recommendation with quarterly reminders
- 60-minute tax planning meeting, with written plan and action items
- Custom checklist of tax documents to gather next tax season
- Year-round question support in your Vivify client portal



*This is your personal tax team - all year long. Ideal for busy, high-income individuals with equity comp, or those going through major transitions like retirement who want expert guidance at every step.*