



# Tax Planning & Advisory Services

CONFIDENTIAL — CLIENT ENGAGEMENT OVERVIEW

# The Legal Right To Pay Less Tax

Most tax practices file returns. We build strategies to protect you. The U.S. Supreme Court confirmed it: every taxpayer has the legal right to arrange their affairs to minimize taxes. We make sure you exercise that right —proactively, strategically, and done right every year.

*"The legal right of a taxpayer to decrease the amount of what otherwise would be his taxes, by means which the law permits, cannot be doubted." — U.S. Supreme Court, 1935*



# Most Tax Practices Are **Working Against You**

The standard model — file a return, send an invoice, repeat — is not tax advisory. The industry has conditioned clients to accept less.

## The Industry Norm

### The Tax Preparer

- Reports what happened last year
- Reactive — waits for documents
- Binary mindset: right vs. wrong
- No strategy between filings
- Billable hours discourage questions
- One deliverable: a filed return
- Pays the IRS what they ask for
- Audit? Not their problem

## The Five Stone Difference

### The Tax Strategist

- Solves for the least tax — always
- Proactive — plans before year ends
- Zealous advocacy: it's your money
- Year-round strategy and support
- Annual support included — no hourly billing
- Two deliverables: a plan and a return
- Pays what the law requires — nothing more
- 100% audit success rate on our watch

# Tax Planning is Three Things



It's not a product. It's not a meeting. It's a fundamental shift in how your tax situation is approached — before, during, and after every filing.

**01**

## A Philosophy

### The Foundation

Every person has the right — and responsibility — to pay the least tax the law permits. Proactive, strategic thinking about taxes isn't optional; it's the only correct approach.

**02**

## An Approach

### How we Work

In everything we do — every process, every question, every communication, every strategy — we are solving for one outcome: the least tax possible.

**03**

## A Service

### What you Receive

A tiered, personalized engagement with two planning calls per year, a written tax plan, year-round support, and return preparation — all built to minimize your taxes.

# Their Rules. Your Advantage

The tax code is written in your favor—more than most practitioners will tell you. We know the rules, and we use them to your advantage.



**"The legal right of a taxpayer to decrease the amount of what otherwise would be his taxes, or altogether to avoid them, by means which the law permits, cannot be doubted."**

GREGORY v. HELVERING — U.S. SUPREME COURT, 293 U.S. 465 (1935) · UNANIMOUS OPINION

A

## **Zealous advocacy is the legal standard**

Tax representatives are legally required to vigorously represent their clients' interests. Treasury Circular 230 mandates aggressive pursuit of every available advantage. Most practitioners don't act this way. **We do.**

B

## **The burden is lower than you think**

A tax position only needs a 20–40% likelihood of success to be defensible. When combined with our 1-in-5,000 audit rate and 100% audit win record, the math is simple: you can confidently take every defensible position available.

C

## **Ambiguity belongs to the taxpayer**

Where the tax code is unclear, the benefit of the doubt belongs to you. We don't leave gray areas on the table — we interpret them in your favor, as the law intends.

D

## **Documentation isn't always required**

The Cohan Rule (1930, still in effect) holds that reasonable estimates of deductible expenses are allowable even without precise records. We know where the standards flex — and use them.

BY THE NUMBERS

# Results That Speak For Themselves

Without proactive tax planning, our clients collectively overpaid more than \$10 million last year. That ends now.

**5x**

Typical return on  
planning fees

**100%**

Audit success rate

**15%**

**Less** Annual tax savings  
available to clients

**1:5K**

Audit rate

**01**

## Onboarding & review

We assess prior returns, entity structure, and forward-looking picture to identify every available opportunity — including amendments where warranted.

**02**

## Return preparation

Your return is prepared with a single mandate: the least tax possible. Every line, deduction, and position reviewed with zealous advocacy as the standard.

**03**

## Mid-year planning call

Before the year closes, we assess your position, adjust projections, and implement strategies that only work before December 31st.

**04**

## Year-end planning call

Final review session to lock in year-end strategies, finalize your tax estimate, and set the stage for the year ahead. Written tax plan delivered.

# The Right Level For Your Tax Opportunity

Every engagement includes tax planning and tax preparation. Calibrated to your tax opportunity. All planning fees are guaranteed.

## FOUNDATIONAL

# \$500

Targeting \$3,000-\$10,000 in savings

- No Stone Unturned return preparation
- Written foundation tax plan
- Go-forward savings recommendations
- Year-round support – no hourly billing
- IRS audit representation included

Savings guarantee – refund if recommended savings fall short of fee

Typical income: up to \$399K

## STRATEGIC

# \$1,750

Targeting \$10,000-\$30,000 in savings

- Everything in Foundational plus:
- Full written strategic tax plan
- Mid-year planning call
- Year-end planning call
- Tax estimate & multi-year projection
- Estate planning tax assessment

Savings guarantee — refund of planning fee if recommended savings fall short.

Typical income: \$400K-\$699K

## ADVANCED

# \$4,750

Targeting \$30,000+ in savings

- Everything In Strategic plus:
- Advanced tax plan
- Mid-year planning call
- Year-end planning call
- Entity structure review
- Asset protection review
- Coordination with financial advisers

Performance fee: 5% on savings achieved (max \$25,000). We only win when you win.

Typical income: \$700K+

\*Services vary based on the level of engagement



# Start saving thousands

Every year without a tax plan is a year the IRS wins. The average Five Stone client saves five times their planning fee. Most have no idea how much they've been overpaying — until we show them.

**BEGIN YOUR TAX PLANNING CONVERSATION**

**Contact Us**

11211 Taylor Draper Lane  
Suite 300 Austin, TX 78759

**Toll Free:** 800.456.5872

**Local:** 512.833.5829

**Email:** [support@fivestonetax.com](mailto:support@fivestonetax.com)