

## About Chan CPA & Company, Inc. Our Team of Professionals

Our firm is comprised of California CPAs, management consultants, experienced controllers and accountants with over 50 years of combined Tax and Financial accounting, CEO, Marketing and Business development experience. Our staff come from the Big 4 and Regional Accounting Firms, and the top 20 Universities in the US. Chan CPA specializes in small business start up and accounting services, international taxation, expatriate taxation, US individual taxation, multi state taxation, and tax planning for individuals and all types of entities.



The CEO/President, Diana G. Chan, is a member of the AICPA, California Society of Certified Public Accountants, and QuickBooks Professional Advisors Program. Her 25 years of experience ranges from auditing with Deloitte and tax with KPMG to ERP implementation at Quantum Corporation prior to forming her own firm and has recently become an AICPA Certified Information Technology Professional.

 **CHAN CPA & COMPANY, INC.**  
**Business, Financial, and Tax Services**



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**1040** *ToGo* 



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### **What is 1040 ToGo?**

- A tax preparation program with an optional tax planning consultation upon request

### **Give Students and Professionals of All Ages a New Benefit That They Will Truly Value**

- Increase tax return satisfaction
- Provide students and professionals an innovative perk to use Chan CPA & Company, Inc.

### **Qualifications**

- Tax return prepared based on **ONLY**:
  - W-2's
  - Interest Income
  - Tuition & Renter's Credit

Note: a separate quote is available for more complex returns

### **Program Details**

Services included in the program:

- Tax return preparation with live tax expert interaction
- Preparation of tax return by a Certified Public Accountant (CPA)
- Tax organizer provided
- Electronic filing of tax return
- Scanned copy of completed tax return provided

### **Chan CPA & Company, Inc. Will:**

- Handle everything from start to finish
- Email a scanned copy of the tax return within 12-15 business days (after receipt of the last supporting document) at the discounted fee

### **How Much Will The Program Cost?**

- Tax Preparation Program: **\$50.00**
- Tax Planning Consultation (if requested): **\$50.00**
- **Savings** of \$100 - \$250
- The original cost of a Tax Preparation Program ranges from \$150-\$300

### **Other Services\***

- Advanced Tax Services and Preparation
- Estate Returns, Corporate Returns
- Estate Tax Planning
- Tax Projections
- Strategic Business Planning
- Accounting Manager and Controller Services
- Entity Formation Consultation: Incorporation, LLC, and LLP
- Retirement Tax Planning

\* call for fee schedule

