Customize Your Consulting Based on Your Practice's Needs

	BASIC	STANDARD	PREMIUM
E-mail Consultations Responses to technical questions would generally be provided within 24 hours for simple questions. (48 hours or less for complex questions)	SOME LIMITATIONS	UNLIMITED	UNLIMITED
Quarterly Retirement Reminders Get reminders about topical issues for the key retirement seasons including IRA Contributions, Tax Reporting, RMDs, and Year-End Related Transactions.			
Webinars by Guest Expert Speakers While we cover the fundamentals of the tax laws that govern IRAs and other retirement accounts, we understand the need for expert knowledge on key areas like social security, tax planning, estate planning and finance.	DISCOUNTED PRICING $129 each	DISCOUNTED PRICING $99 each	
Telephone (Zoom) Consultations Scheduled telephone (or Zoom) consultations to discuss your particular IRA challenges or difficult client IRA matters.		12 PER YEAR (60 MINUTES EACH)	UNLIMITED (60 MINUTES EACH)
Periodic Updates on Topical Issues. Written and/or via webinars Updates related to IRAs and employer retirement plans when the IRS publishes private letter rulings and official announcements, updates on tax court cases, and new tax laws.			
IRA Quick Reference Guide (PDF) A booklet with over 20 IRA quick reference guides that summarize applicable rules. These include checklists and cheat sheets for RMDs, rollovers and transfers, qualified charitable distributions and many others!			
Four Client-Friendly Letters Client-facing letters that can be sent to clients or prospects throughout the year that cover seasonal topics and other pertinent reminders and explanations.			
Interactive and Customized IRA Training for You (and Your Staff) Educational webinars are great, but sometimes more detailed training is necessary. With our interactive training, you and your team will be able to participate in courses that include Q&As and quizzes that encourage learning and retention.			2 PER YEAR (60 MINUTES EACH)

FIXED FEE PER MONTH			
Single Advisor	$99 SUBSCRIBE	$199 SUBSCRIBE	$249 SUBSCRIBE
2 to 5 Advisors	$149 SUBSCRIBE	$349 SUBSCRIBE	$499 SUBSCRIBE

Requires a 12-month commitment and then is renewed automatically on a month-to-month basis with a 30-day cancellation policy.

If you would like to create a customized consulting plan, please contact us at 973-313-9877 or help@applebyconsultinginc.com.