



FiveStone | TAX ADVISERS



Tax Planning & Advisory Services

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

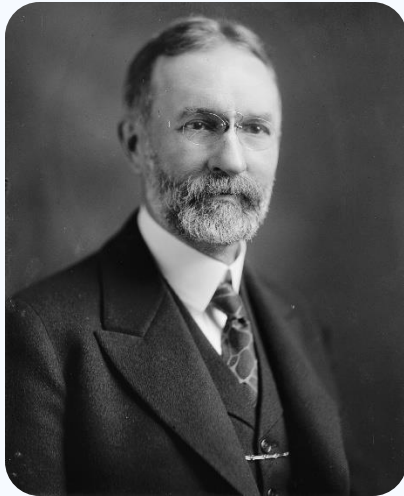
A Service

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 legitimate 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. Typical annual tax
savings for 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
- 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:
- 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

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

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

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