Vaulted OS



VAULTED DISCOVERY

YOUR DISCOVERY.

A clear look at your money.

PREPARED FOR

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What we do

STEP ONE

Connect Your Accounts

- ✓ Link your bank and credit cards through Plaid
- ✓ Add us to your QuickBooks, if you have it
- ✓ So we see what's done and what isn't

STEP TWO

Send Your Last Tax Return

- ✓ Business and personal, if you have both
- ✓ Can't find it? We'll get it from the IRS

STEP THREE

Fill Out Your Client Profile

- ✓ Your businesses and who owns them
- ✓ Any years not filed
- ✓ Any IRS or state letters

Not included: catch-up bookkeeping, tax prep, or filing. Those are quoted after Discovery.

What It Costs

DISCOVERY

$500

Discovery · One time. Paid today.

$500

The day you accept · Vaulted Discovery

Bank payments have no fee. Card payments add a 3% processing fee. Accepted by checkbox at kennylewis.endlesswinning.com. Vaulted OS · 6340 Lake Worth Blvd #1019, Fort Worth TX 76135.