Special Offer for NEPBA Member!
Tax and Financial Advising Services at Negotiated Discounts

We have been working with NEPBA since their inception at a corporate level and are ready to offer our services to all of its members. We are a full service CPA firm and financial advisory firm located in Needham, MA. We work with clients throughout the United States and have had relationships with many of them for more than 20 years. We look forward to working with you.

Contact us at **617-566-3645** or email David or Ben at DLevy@dalcpapc.net or BLevy@FreemanFinancialLLC.com. Both David and Ben can help you with both tax and advising services.

David A Levy CPA PC has been performing tax return of all complexities for over 30 years. Our rate for a standard tax return is $300 but we are offering all NEPBA members standard tax returns for $225, a **25% savings!** This tax return includes income earned from work, investment income, itemized deductions and all tax credits.

For NEPBA members with investment real estate or small businesses, we will prepare your return for $400. Our standard fee for these types of returns is $500. A **20% savings!**

Freeman Financial LLC is a small investment advisory founded in 2017 by members of David A Levy CPA PC. We conservatively invest our client's money with the goal of positive and consistent returns. We help our clients save for retirement, buying a house, college and many other life events.

Our standard fee structure starts at 0.9% of assets under management but for NEPBA members, we will charge 0.6% of assets under management. A **33% savings!** For accounts over $250,000 this fee will drop even more. The special offer we are extending to NEPBA members is about 40% below the industry average.

All of our tax and investing clients are encouraged to call for advice throughout the year and will speak with one of our professionals right away at no additional cost.

Benefits of using the same tax accountant and financial advisor include:

- Using tax planning to buy and sell investments to minimize your tax liability
- Investment information readily available to prepare your tax returns
- Tax accountants with years of investment experience and knowledge
- Investment advisors with years of tax and business experience

David A Levy, CPA

Ben Levy, Financial Advisor