

# Accountable Plan Service Packages

from Reeder CPA Group

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## 1. Basic Compliance Package

### Ideal for:

Small business owners and single-member LLCs seeking a straightforward, IRS-compliant accountable plan.

### Includes:

- » **Standardized Written Accountable Plan** with minimal customization.
- » **One-time compliance discussion call** to review the plan, IRS requirements, and next steps.
- » **List of Eligible Expenses** (mileage, home office, travel, etc.).
- » **Basic Documentation Templates** for tracking reimbursements.
- » **Compliance Checklist** to ensure adherence to IRS guidelines.
- » **30 Days of Email Support** for follow-up questions and minor clarifications.

**Basic Plan Starting at \$500 (One-time setup)**

## 2. Standard Implementation Package

### Ideal for:

Business owners with employees or S-Corp owners needing structured expense tracking and payroll integration.

### Includes everything in **Basic**, plus:

- » **Guided implementation** to integrate the plan within payroll and accounting systems.
- » **Expense Reimbursement Workflow Setup**, including guidance on integrating with QuickBooks or other accounting software.
- » **Coordination with Payroll Providers** to ensure proper classification and processing of reimbursements.
- » **Employee Training Session & Documentation** on tracking, documenting, and submitting expenses.
- » **IRS Audit Protection Guide**, outlining best practices to avoid penalties.
- » **Review of the First Reimbursement Cycle** to ensure compliance and identify necessary adjustments.
- » **60 Days of Email Support** for additional questions during implementation.

**Standard Plan Starting at \$1000 (One-time setup + support)**

## 3. Full-Service Accountable Management Package

### Ideal for:

Growing businesses requiring ongoing compliance, periodic updates, and IRS audit protection.

### Includes everything in **Standard Implementation**, plus:

- » **Quarterly Compliance Reviews** to monitor reimbursement processes and ensure ongoing IRS compliance.
- » **Annual Policy Review & Updates** to reflect tax law changes and optimize reimbursement policies.
- » **Proactive Monitoring of IRS Updates**, such as mileage rate adjustments and substantiation requirements.
- » **Payroll & Tax Reporting Support**, ensuring proper classification of reimbursements.
- » **IRS Audit Support**, including guidance in case of an IRS review related to accountable expenses.
- » **Priority Email & Phone Support** for faster response times and troubleshooting.

**Full-Service Plan Starting at \$2000 (Annual subscription)**

## Accountable Plan FAQ

### What is an accountable plan?

An accountable plan is an IRS-compliant reimbursement arrangement that allows businesses to reimburse employees for business expenses without treating them as taxable income.

### Who benefits from an accountable plan?

Business owners, including C corporations, S corporations, partnerships, and sole proprietors with employees, can use accountable plans to deduct expenses while ensuring reimbursements remain tax-free.

### What expenses qualify for reimbursement?

Common eligible expenses include mileage, home office costs, travel, meals, and work-related supplies. Expenses must be business-related and properly documented.

### What documentation is required?

To comply with IRS rules, businesses must maintain records of:

- » The nature and purpose of expenses
- » Receipts or bills as proof
- » Reimbursement reports detailing date, amount, and business purpose

### What happens if expenses aren't documented properly?

If reimbursements don't meet IRS substantiation requirements, they may be reclassified as taxable wages, increasing payroll tax liability.

### Does my business need an accountable plan?

If your business reimburses employees for expenses, an accountable plan ensures compliance and tax efficiency while avoiding unnecessary payroll taxes.

### Can a business owner reimburse themselves?

Yes, owners of S corporations and C corporations can use accountable plans to reimburse themselves for qualifying expenses, provided the reimbursements follow IRS rules.

### Where can I find more information?

Check out our [Accountable Plan Fact Sheet](#) for more information or message our team for more information.

*This fact sheet is for informational purposes only and does not constitute legal advice.*