

Tax planning and advisory services go beyond tax preparation

Successfully navigating tax reform changes requires more than tax preparation, which is why we're updating our service offering to include tax planning with every engagement. A consistent, long-term focus on tax planning strategies will help minimize your taxes.

With advances in technology, we are moving our services to a cloud platform where we can easily engage and collaborate with you throughout the year, which saves you time collecting and organizing tax documents. 98% of users agree that QuickBooks Online increases their confidence about managing business finances, which is why we use it as our advisory platform.

The cloud enables us to be more engaged advisors with our business clients. 89% of small businesses say they are more successful when working with an accounting professional. Our goal is to minimize your tax liability and help you reach your goals. Using QuickBooks Online, we can provide the right level of advisory services for your business.

We are including tax planning in all three of our levels of service. The following summarizes the services included in each bundle, and we look forward to discussing the right level of service for you and your business.



Tax Planning Basics

Onboarding & Training
Annual Tax Planning Meeting
QuickBooks Online Subscription
Entity Review
Owner Payroll Allocation
Retirement Plan Review
Business & Owner Tax Prep
Estimated Tax Vouchers

Advanced Strategies

*Everything in **Basic plus***
Quarterly Performance Review
Advanced Tax Strategies
Business Goal Tracking
Electronic Document Storage
Staff Accounting Training
Sales Tax Return Filing
Employee Time Tracking
Payroll Return Filing

Full Service Advisory

*Everything in **Advanced plus***
Monthly Performance Review
Controller Services
Bank & Credit Reconciliations
Month End Close
Cash Management Advisory
Growth Advisory
Accounts Payable
Payroll Processing
Custom Reporting

Name:

Phone:

Email:

Website:

Contact information provided by your local independent accounting professional.