

Business Tax Preparation & Planning

FACT SHEET

What We Offer

You want a professional handling your taxes to help you remain on a healthy financial path. We focus our tax preparation and planning services around providing you the right amount of tax support—year round.

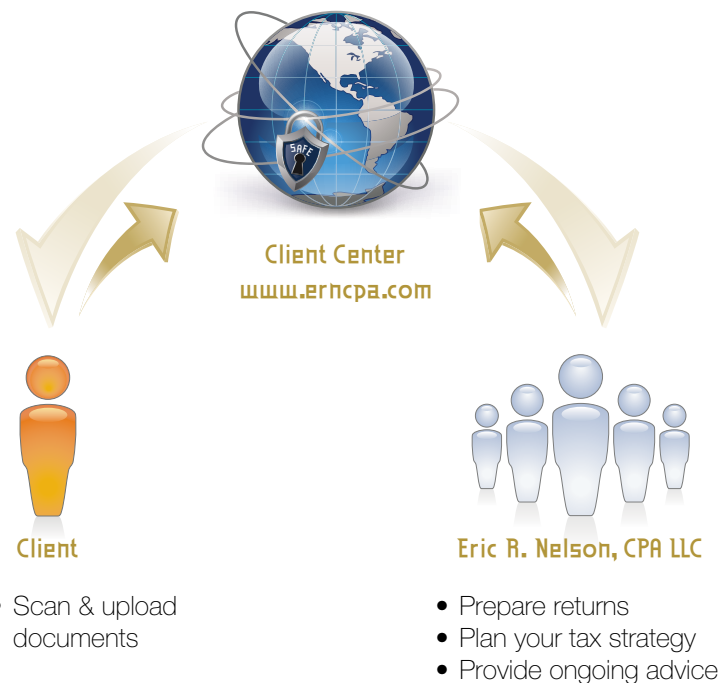
Our experienced professionals excel at tax preparation for C-Corporation, S-Corporation, Partnership, and LLC returns. Whether you're looking to buy or sell a business, or pension plan contribution advice, our firm will handle it with expertise and precision.

We also understand the necessity of planning a sound tax strategy to mitigate your tax burden and grow the value of your business. Our tax planning service provides you with a dedicated partner. We work with you to develop a personalized plan with tax-saving strategies that are tailored to your unique situation.

We want to earn the right to be your trusted tax partner.

The Value of Our Service

- **Offers peace of mind**—know that your trusted, experienced advisor is accessible to answer questions and help plan a proper tax strategy to meet your unique needs.
- **Provides personal, one-on-one service and guidance**—we offer answers to your important tax-related questions in language you understand.
- **Offers the convenience of an online, paperless process**—you can submit your tax source documents online and access your completed return instantly in your secure portal.
- **Ensures security of data**—exchanging documents within our online platform is more secure than sending documents via email.



The Convenience of Our Online Platform

Our Client Center enables you to exchange documents with our staff in real time via the web and provide a direct link to us—24/7

FACT SHEET Tax Preparation & Planning - Business

Our Comprehensive Business Tax Services

Our mission is clear: To earn our place as your financial advocate. To accomplish this, we provide service that extends well beyond basic delivery of tax documents. We work in partnership with you to make sure you understand your data and are well-informed. Consider all we can do for you:

- **C-Corp, S-Corp, Partnership, and LLC tax return preparation**—we've been supporting small business for decades, so rest assured your return will be prepared accurately.
- **Depreciation calculations**—we apply current IRS formulas and tables to determine proper depreciation deductions based on cost and type of asset.
- **Tax planning**—we work in partnership with you all year round to ensure you have a current view of your financial health and make sound decisions to mitigate your tax burden.
- **Mergers & Acquisition consulting**—we will work with you to achieve the best possible tax structure when acquiring or selling a business.
- **Basis calculation and tracking**—includes calculation of a partner's or shareholder's basis within their respective business entity and tracking of yearly increases and decreases.
- **S-Corp reasonable compensation consulting**—we provide you with benchmarks for officer salaries based on similar industry standards.
- **Pension plan contribution consulting**—ensures that you are investing your money wisely in preparation for retirement. We identify qualified plan types, such as 401K and SEP, and inform you of due dates and contribution limits.

“We build a plan of care around your specific needs. Together, we'll move beyond your goals to make your dreams a reality.”

CONTACT US TODAY

For more information on Business Tax Preparation and Planning, or other services, please contact our firm. We are happy to discuss how we can help you meet your financial goals.

Call or click today for a complimentary, introductory appointment.



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