



Tax and Audit Assistance: We can make sure that your books and records are complete, accurate and in a format that will assist in your periodic tax filings and, if necessary, audit. This aids in ensuring that you are able to take full advantage of the tax saving strategies available to you. Additionally, this often results in quicker filings and cost savings because your tax preparer and/or auditor spend less time and effort in compiling your data. Because of our expertise working in the areas of both tax and audit for a large national CPA firm, we understand how best to prepare and present our clients' financial information in an efficient manner.

- Audit Facilitator–Liaison
- Financial Statement Development
- Audit Schedule Preparation
- Footnote / Disclosure Development
- Application of GAAP Standards
- Regulatory Filings
- Financial Documentation Review
- Audit Readiness Assessment
- Auditor Selection Guidance
- DOL Audit Preparation
- IRS / FTB Facilitator–Liaison
- Tax Preparer Coordination
- Federal / State Tax Guidance
- Tax Return Review
- Like–Kind Exchanges
- Sale / Purchase of Assets
- Payroll Tax Remittances
- 1099/1098 Filings
- Schedule C Deductions
- Sales & Use Tax

Mission Statement: It is our goal to be the premier provider of outsourced accounting, financial and other support services for privately–held businesses, enabling them to maximize their growth and improve profitability by providing them with timely, accurate and actionable financial information and allowing them to confidently focus on their core business and customer service rather than their back–office processes.

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