

Virtual CFO Tier 1 Compliance Package

Starting $2,000 / Month

Client Size 0-5 Employees

Basic Bookkeeping & Tax Planning

Virtual Meeting 1X / Month

Quarterly Meetings

Unlimited Emails (3 Day Response Time)

1.) Advise & Help with Daily Tax and Financial Tasks:

- Licensed IRS Enrolled Agent on Call. (5 Day Response Time
- Keep your business in compliance with new IRS, State and Local Tax Laws.
- Oversee Financial matters avoiding Fines or Legal Action. (Peace of Mind)
- Assistance with Financials Matter

2.) QuickBooks Setup: (One Time)

- Link Accounts to QB's (Banks, Square, Stripe, Avalara, Housecall Pro, Amazon, Etc.)
- Set up Chart of Accounts
- Set Rules and Classes
- Track Income & Expenses
- Track Miles Correctly
- Maximize Tax Deductions
- Employee/Contractor GPS time & Location Tracker (Add on)

3.) Preparing QuickBooks Reports Such As: (Quarterly)

- Profit & Loss Reports
- Accountant & Tax Reports
- Balance Sheet
- Banking Reports
- Banking Reconciliation
- Class Tracking

- Custom Financial Reports
- Customers & Receivables Reports
- Employees & Payroll Reports
- Expenses & Vendors
- Inventory Reports
- Jobs, Time & Mileage
- Purchase & Sales Reports
- QuickBooks Projects (Track Labor Costs and by Customer or Job)

4.) Payroll Services: (Bi-Weekly / Monthly)

- Set Up Employee Payroll
- Entering Time Sheets
- Processing Employee Payroll
- Process Monthly and/or Quarterly Shareholder Distributions
- Uploading Third Party Payroll Reports
- Manage Accounts Payable & Receivables
- Collect Overdue Receivable
- Prepare Monthly, Quarterly & Yearly Payroll Taxes with Taxing Authorities

Creighton Spies EA
IRS Enrolled Agent
President @ Spies Tax Connections
Mobile : 720-988-0688
Fax : 303-578-7668
www.spiestaxconnections.com

Schedule an Appointment:
https://calendly.com/spiestax