Spies Tax Connections
TAILORED TAX SERVICES

Virtual CFO Tier 3 Strategic Package

Starting $7,000 / Month

Client Size 0-20 Employees

Proactive Tax Planning

Virtual Meeting 4X / Month

Quarterly Meetings

Unlimited Emails

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

- Licensed IRS Enrolled Agent on call. *(1 Day Response Time)*
- Keep your business in compliance with new IRS, State & Local Tax Laws
- Oversee Financial matters avoiding Fines or Legal Action.
- Assistance with Financial companies

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

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

- 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 & Profitability of Jobs)*

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

- 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

5.) Business Structuring & Growth: (Monthly / Quarterly)

- Setting up a Tax Efficient S Corporation *(30/60/10) (Minimizing Self-Employment Tax)*
- Shareholders Reasonable Salaries, Contributions & Distributions
- Represent & Advise with Factoring, Lenders & Financial Institutions *(Bank Relationship)*
- Benefits of Revocable Living and Irrevocable Trusts *(Minimizing Tax Burdens)*
- Annual Budgeting
- Annual S Corp Meeting *(S- Corp Requirement)*
- Cash Flow Forecasting *(6 / 12 Month)*
- Measuring Key Performance Indicators *(KPIs)*
- Monthly Books Review & Profitability Report *(Strategic Planning)*
- Advise on Business Deals and/or Projects *(Risk Analyses)*
- E-file 1120-S Corporation Tax Return

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