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***Creative, People Oriented Professionals Providing Superior Client Service
and Solutions***

Areas of Business:

Tax Planning and Preparation – Individuals, Businesses(Corporations, Partnerships and LLC's) & Estates and Trusts.

Accounting Services – Compilations, Reviews, Audits, Periodic reporting and special purpose reporting.

Estate Planning and Administration – Planning consultations, review of existing plans and documents, assist executors and trustees, serve as trustee and consultation on elder care issues.

Personal Financial Planning – Assemble financial information, defining objectives, providing recommendations and updating your existing plan.

Computer Consulting Systems – Evaluate needs and resources, software selection, software installation, training and ongoing support.

Other Services – Structuring New Business, Preparation of Budgets, Outsource Controller and CFO, Business Valuations, Buy/Sell Agreements, Succession Planning.

Best Referrals:

Individual with tax analysis needs, including investments, stock options, business owner. Any individual needing to file a tax return.

Small business owner with need for tax compliance, tax planning and accounting needs such as compiled financial statements, budgets analysis, review or audit.

Small business with need for a system analysis regarding software, system needs and solutions for improvement and efficiency.