



**LOCAL ROOTS.
LASTING PARTNERSHIPS.**

ACCOUNTING | TAX | ADVISORY

MORE THAN A TAX RETURN

Running a business takes more than filing a tax return once a year. Our monthly business subscriptions keep your books current, your taxes in check, and your financial information working for you all year long.

*Accounting for
a Brighter Tomorrow.*



CLARITY

Know where your business stands.



STRATEGY

Make informed decisions.



SUPPORT

A dedicated partner throughout the year.



LOCAL

Proudly serving businesses in our community.



*Your Business.
Our Focal Point.*

BUILD YOUR PLAN

CHOOSE WHAT YOU NEED.
WE'LL CUSTOMIZE THE REST.

Every business is different. That's why our monthly subscriptions are flexible. Select the services you need, and we'll build a plan that fits your business.



BOOKKEEPING & ACCOUNTING

- ☐ Transaction categorization
- ☐ Bank & credit card reconciliations
- ☐ Balance sheet review
- ☐ Routine adjusting journal entries
- ☐ POS & accounting coordination
- ☐ Invoice, payment & deposit matching



TAX & COMPLIANCE

- ☐ Annual business tax preparation
- ☐ Federal & state filings
- ☐ Sales tax compliance
- ☐ Payroll processing & payroll taxes
- ☐ 1099 preparation
- ☐ Ongoing tax advisory



ADVISORY & FINANCIAL INSIGHT

- ☐ Financial reporting
- ☐ Compilation reports
- ☐ Quarterly financial check-ins
- ☐ Tax planning throughout the year
- ☐ Budgeting & cash flow discussions
- ☐ Strategic guidance for growth

*A Plan for Today.
A Stronger Tomorrow.*

TYPICAL SUBSCRIPTIONS START AROUND \$500 PER MONTH

From essential bookkeeping, tax & advisory support to more comprehensive engagements with quarterly financial check-ins and review of the quarterly compilation report.

BUSINESS ACCOUNTING
SUBSCRIPTIONS



**LET'S BUILD
A STRONGER
TOMORROW
TOGETHER.**

HOW IT WORKS

- 1 WE LEARN YOUR BUSINESS**
We review your accounting system, transaction volume, tax requirements, payroll, sales-tax obligations, and reporting needs.
- 2 YOU CHOOSE YOUR SERVICES**
Select the services you need, and we'll identify the right level of support for your business.
- 3 WE BUILD YOUR PLAN**
You receive a clear scope of services and a predictable monthly fee tailored to your business.
- 4 WE STAY INVOLVED**
Your accounting, tax, and advisory services work together throughout the year — not just at tax time.

COMMON QUESTIONS

Can I pick and choose services?

Yes! We customize each plan based on your needs.

Is payroll included?

Payroll can be added to your plan based on employee count and frequency.

Does the monthly fee include the tax return?

Yes, for most engagements. We'll clearly define what's included in your customized plan.

Can the plan change as my business grows?

Absolutely. We'll adjust your services as your needs evolve.

READY TO BUILD YOUR PLAN?



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Divide, CO | Woodland Park, CO
By Appointment Only

ACCOUNTING FOR WHAT MATTERS.