

Accounting + Tax + Advisory + Planning



# WINTER ACCOUNTING & ADVISING CPAs

## TAX SERVICES

WAA offers year-round tax planning for small to medium-size businesses and individuals. We develop tax planning strategies for existing business owners to minimize their overall effective tax rate. For start-up companies and new business owners, we assist with entity selection based on a company's business plan while maximizing tax savings. The same tax savings goals are also offered to our individual clients. Although business ownership may not be present, we tailor tax planning for such individuals based on current/future investments, inheritances, special tax deductions and credits, etc.

**OUR TEAM OF ACCOMPLISHED TAX ACCOUNTANTS WILL ENSURE THAT ALL BUSINESS AND INDIVIDUAL INCOME TAX RETURNS ARE PREPARED EFFICIENTLY, ACCURATELY, AND COMPLETE WHILE MAXIMIZING TAX SAVINGS.**

## ADVISING

WAA is committed to ensuring that each of our clients have the guidance and resources they need to optimize their goals and run their business successfully and efficiently. We offer a personalized experience to each of our clients by maximizing our availability, prompt attention, and responsiveness to every individual or business matter. This gives them a peace of mind so they can focus on their personal and business goals knowing they have a valued CPA and business advisor just a phone call away that provides competent and thorough professional advice.

Recent studies conclude that Americans spent 8.9 billion hours complying with federal tax laws.

What does this all mean for taxpayers? In short, that they're spending a lot of cumulative time complying with federal income tax laws. A recent estimation from the IRS suggested taxpayers would spend an aggregate of 8.9 billion hours complying with federal income taxes per year. That's nearly the equivalent of 13,000 lifetimes!

## ACCOUNTING / BOOKKEEPING

WAA provides professional bookkeeping services to our clients by using traditional desktop software programs, online software, and remote desktop access programs. WAA has an excellent team of staff that can handle your payroll responsibilities such as preparing/issuing periodic payroll and preparing/filing quarterly payroll tax returns.

## AUDIT & ASSURANCE

WAA serves clients in various industries, including manufacturing, trucking, real estate, not-for-profit, among others. Our audit and attest services include:

Compiled Financial Statements

Reviewed Financial Statements

Audited Financial Statements

Agreed-Upon Procedures

Financial Forecasts/Projections

Forensic Accounting

## SERVICE OFFERINGS

- Business Plan Assistance
- Entity Selection
- Budgeting Assistance
- Cash flow Analysis and Improvement
- Outsourced Accounting
- Tax Planning and Compliance
- Financial Statement Preparation and Analysis
- Business Valuations
- Succession Planning
- Investment Consulting
- Retirement Planning
- Cost Segregations
- Mergers & Acquisitions



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