

Tax Preparation & Planning

FACT SHEET

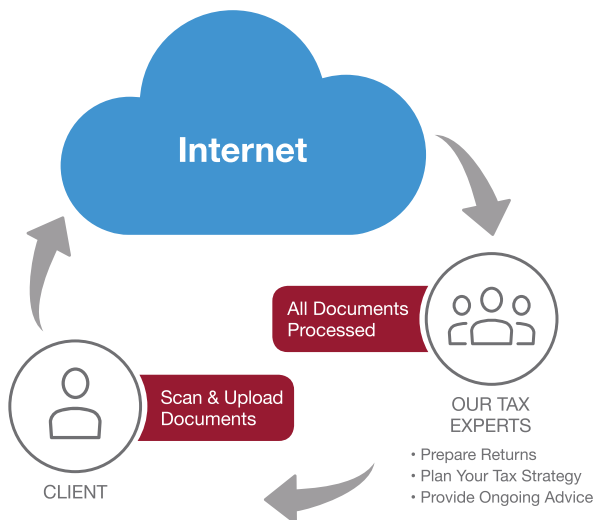
Stay on a healthy financial course with proper tax prep and planning.

What We Offer

You want a professional handling your taxes to help you remain on a healthy financial path. Our comprehensive tax preparation and tax planning services focus on your need for sound, expert tax support—year round.

Our experienced professionals excel at tax preparation for both businesses and individuals. Whether it's an S-Corporation, C-Corporation, Partnership, or Individual return, we are always focused on strengthening your financial position.

We also understand the necessity of planning a sound tax strategy to mitigate your tax burden and improve cash flow. Our tax planning service provides you with a dedicated partner. We work with you throughout the year—not just at year end or during tax season—to develop a personalized plan with tax-saving strategies that are tailored to your unique situation. We want to earn the right to be your trusted tax partner.



The Convenience of Our Online Platform

Our advanced portals enable you to exchange documents with our staff in real time via the web and provide a direct link to us—24/7!

The Value of Year-Round Service

Offers peace of mind—know that your trusted, experienced advisor is accessible to answer questions and help plan a proper tax strategy to meet your unique needs.

Provides personal, one-on-one service and guidance—we offer answers to your important tax-related questions in language you understand.

Offers the convenience of an online, paperless process—you can submit your tax source documents online and access your completed return instantly in your secure portal.

Ensures security of data—exchanging documents within our online platform is more secure than sending documents via email.



Steven M. Ellard, CPA

The Experience and Dedication Required

Our mission is clear: To earn our place as your financial advocate. To accomplish this, we provide service that extends well beyond basic delivery of tax documents. We work with you throughout the year to make sure you understand your data and are well-informed, so you can make sound financial decisions.

Because our mission is to be your trusted advisor, we offer our tax preparation and planning services. You have the peace of mind that our tax experts are preparing your return. You also receive ongoing guidance and advice on items that affect your financial well-being, such as appropriate deductions, necessary changes to payroll tax withholdings, and more—all geared to mitigate your tax liability and increase cash flow.

Our professionals provide all the expertise you require under one roof. You need look no further than our firm for your tax preparation and planning needs.

It's tax preparation and planning by seasoned experts whose main goal is to assist you in planning for **long-term financial well-being and success.**

Contact Us Today

For more information on Tax Preparation and Planning or other services, please contact our firm. We are happy to discuss how we can help you meet your financial goals. We look forward to hearing from you.

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Steven M. Ellard, CPA