

Blurbs for Your Client Newsletter, Blog or Website

Let Us Help You Leverage What You Can Learn from Your Tax Return

What does your [tax return](#) say about your financial situation? The fact is, the paperwork you file each year offers excellent information about how you are managing your money—and about areas where it might be wise to make changes in your financial habits. If you have questions about your financial situation, remember that we can help. Our firm is made up of highly qualified and educated professionals who work with clients like you all year long, serving as trusted business advisors. So whether you are concerned about budgeting; saving for college, retirement or another goal; understanding your investments; cutting your tax bite; starting a business; or managing your debt, you can turn to us for objective answers to all your tax and financial questions.

We Can Help You Address the Issues that Keep You Up at Night

Where will your business be in five years? Would strategic budget cuts in some areas improve your company's health? Are there ways you can boost revenue? If you're nearing retirement, is there a buyer or successor in the wings? These are the kinds of questions that keep many business owners up at night. Fortunately, as your CPA, we can probably help you sleep a little easier. Our firm is made up of highly qualified and educated professionals who work with clients like you all year long, serving as trusted business advisers. We act as coaches, guides and trainers for our business clients, helping them chart the best route to success. So be sure to turn to us with all your business questions or concerns.

But Wait – There's More!

We have just finished an important project for you. Our team drew on extensive knowledge and worked with precision to complete the engagement, and we want you to be pleased with its outcome. So, it's important to remember that numbers are only part of the equation. As your trusted tax advisor, we strive to make sure those numbers have meaning to you.

We're not saying the bottom line is unimportant, quite the contrary. It's what we do with those numbers that demonstrates how a CPA relationship can be of value to you and your business. Our role as your CPA goes beyond providing you a commodity product. It's also about helping you understand what those numbers mean. And what impact those numbers can and will have on you and your business—both now and in the future.

- What do the numbers mean to you and your business?
- How will those numbers affect you and your business over the next year?
- What changes can be made to positively impact future results?

As your CPA, we can offer insightful information that goes way beyond numbers, in terms of that make sense to you and help you plan for the future.

What's So Great about CPAs?

You may not have asked yourself that question in so many words, but you may have wondered what sets CPAs apart from other financial professionals. The answer in short: A lot. We typically begin our careers with years of college and graduate education. To become licensed, we must take the demanding Uniform CPA Examination, which tests our knowledge on a wide range of business topics over a total period of 14 hours. In addition, we have to meet an experience requirement and then be licensed by a State Board of

Accountancy to practice. But it doesn't stop there. Once we become CPAs, we also must meet continuing education requirements to update our knowledge of new business developments as well as commit to a strict code of ethical standards. Armed with this rigorous training, we're on the job year round, ready to help individuals and businesses address their own unique challenges.

If you want more information about our firm and how we can help you resolve all your financial issues, don't hesitate to contact us.

When the IRS Requests Accounting Software Files, Your CPA Firm Can Help

Did you know that IRS is requesting accounting software files in association with audits of small businesses? It is one of the areas where CPAs can leverage our broad accounting experience as it relates to our tax services. We regularly work with software such as QuickBooks or Peachtree and can offer advice, for example, on managing the settings, security and processes associated with these programs. As part of that expertise, we can help you understand the answer to questions such as when it's appropriate to say no to an IRS request for an electronic copy of a QuickBooks or Peachtree file. No matter what your concern, turn to your CPA firm for expert insights and advice.

Have Questions? We're Here All Year!

Many clients see their CPAs at tax time, when the main focus is on completing and filing their tax return. As a result, they may not take the opportunity to ask questions about long-term tax planning or about other important financial concerns. The good news is that we are available to you all year. We have a full-time, year-round staff of experts with extensive expertise in a broad range of financial areas. We're ready when you are to take some time reviewing your financial situation, helping you understand your options and make the best decisions. We're also here in an emergency to help address unexpected financial concerns. So, give us a call to discuss your important financial issues whenever they arise.