

HELPFUL WEBSITES

www.irs.gov

Home page of the Internal Revenue Service
featuring the Digital Daily

www.ssa.gov

Home page of the Social Security Admin.

www.access.wa.gov

Washington State info & services

www.taxpenalty.com

Automatically computes penalties but if
they can't save you \$250, it's no cost

www.fafsa.ed.gov

www.finaid.com

Free application & user friendly guide to
financial aid

www.cheaptickets.com

www.lowestfare.com

Unlike priceline.com, bidding is not required.

www.cardratings.com

General info on the world of credit cards

www.nadaguides.com

www.kbb.com

Auto valuation from NADA & Kelly Blue Book

www.realtor.com

Nationwide listings of property & homes for sale

www.homepricecheck.com

No cost database of sale prices for properties
by address. Service may not be avail for all counties.

www.annualcreditreport.com

No cost annual credit report

www.resellerratings.com

Consumer verified online stores

www.westbeachwellness.com

Best kept secret in America for improved
health and finances

Established 1979



360.929.0495

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Harriet Berg Consulting Associates

BTA, Inc.

Formerly Berg Tax Accounting, Inc.
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Remember

*We do our Homework,
So you don't have to!*

A Short History

What began in 1979 as an idea for a busy mother to stay home with her growing family has become one of Oak Harbor's longest running and most successful small businesses. Berg Tax Accounting, Inc., now known as BTA, Inc, began at Bob and Harriet Berg's dining room table. In 1993, Harriet earned the title of Enrolled Agent, a status that allows her to represent clients before the IRS. Capitalizing on the freedom that technology now allows, Harriet has relocated her practice to once again work from home. Now BTA, Inc. has a growing list of business clients across the United States.

One of our specialties is small business consulting. Forethought is given to determining the best tax structure for the client's business needs. We spend time explaining the pros and cons of other business considerations as a critical part of each interview. We find personal pleasure in being part of your team's success.

We provide a systematic and personalized client interview which focuses on our client's individual needs and concerns. Secondly, we ask questions designed to save you money and insure compliance with IRS regulations. This personalized interview allows us to probe beyond final figures into the evolving process of tax planning. Decreasing our client's tax liability within legal boundaries is a primary goal. We are committed to providing flexible tax preparation and planning.

We recognize the position of trust our clients give us and look forward to serving them for many more years. **Referrals are always welcome.** We appreciate and recognize that the greatest compliment our clients give us is their referral of others.

Professional Services

Enrolled Agent: *An Enrolled Agent is federally licensed to represent taxpayers before all administrative levels of the Internal Revenue Service.*

Individual (1040) Tax Returns

- ***Dependency & Filing Status Issues***
- ***Domestic Relations Filing Issues***
- ***Retirement Funding Strategies***
- ***Sole Prop's, Rentals, Passive Income***
- ***Tax Planning & Estate Returns***
- ***Electronic Filing – Military Tax Issues***
- ***Taxpayer Representation***
- ***State Returns***

Business Consulting & Entity Planning

- ***Sole Proprietorships***
- ***Limited Liability Companies***
- ***Corporations***
- ***Partnerships***
- ***Estates & Trusts***
- ***Non-Profits & Homeowner Assocs.***

****Investments***

- ***Harriet Berg, EA, Financial Advisor with Cetera Financial Specialists LLC, member FINRA/SIPC.***
- ***Accounting and Tax Services offered by BTA, Inc. which is not affiliated with Cetera Financial Specialists LLC.***
- ***Investment and insurance products distributed by Cetera Financial Specialists LLC, member FINRA/SIPC and a licensed insurance agency (dba Cetera Financial Securities LLC and Insurance Services in CA). Home office at 200 N. Martingale Road, Schaumburg, IL 60173; phone 888.528.2987***

Our Privacy Policy

It is the policy of BTA Inc. to handle the information you provide us with the utmost confidentiality and care.

We restrict access to nonpublic, personal information about you to members of our firm who need to know this information in order to complete the work you have hired our firm to do.

We will not disclose your personal and confidential information to anyone outside our firm without your express written permission to do so.

We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.

Call 360.929.0495

**** Referrals Welcome ****

Tax Services available internationally.