



***Eldercare***



***Advisory***



***Tax***



***Accounting***



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## ***Our Eldercare Accounting Services***

• ***We provide elder clients with assistance for their daily financial affairs, business & related duties.***

• ***Our eldercare accounting services range from simple estate planning to more complete services such as managing finances & paying bills for elderly clients & their family in need.***

• ***Our services are offered directly to the elder client, or we can be retained by relatives of the elder client who are looking out for their parent's or loved one's best financial interest.***

• ***We deal with more emotional issues with our elder clients, & have a great deal of patience, empathy & tact to serve our clients & their families with a quality of service, understanding & trust.***

### • ***Major Highlights:***

- ✓ ***We organize financial records to identify all assets, liabilities, revenue sources & expense commitments***
- ✓ ***We set up a process to establish necessary internal controls over a client's financials***
- ✓ ***We review & pay household bills and take care of budgeting, record keeping & balancing of bank accounts***
- ✓ ***We monitor & track total financial portfolio including cash receipts, investments & real estate***
- ✓ ***We prepare & file income, trust, gift & estate tax returns & related planning***



## **Our Consultation & Advisory Services**

- **We provide business consultation:**
  - ✓ Provide guidance & reporting for start-up businesses
  - ✓ Provide business solutions
  - ✓ Assist with loan applications, credit policies, cash flow concerns, cost controls & other management issues

- **We coordinate personal finance:**
  - ✓ Establish budget for individuals
  - ✓ Organize bank accounts & financial records
  - ✓ Periodic review of financial position
  - ✓ Manage monthly payments & receipts

- **We provide individuals & businesses with strategic planning & analysis.**

- **We deliver analytical consultation services to help clients better organize, coordinate & control their financial performance.**

- **We oversee project management through planning, implementation & quality control.**

- **We assist clients to develop measures of internal control to mitigate risk and improve performance.**

- **We are a proficient financial process coordinator, troubleshooter & problem solver.**



## **Our Tax Preparation Services**

- **Tax Return Preparation & Filings:**
  - ✓ Federal & State individual tax returns
  - ✓ Business tax returns (Partnerships, Corporations, LLCs, LLPs)
  - ✓ Estimated tax analysis & planning
  - ✓ Non For Profit Reporting
  - ✓ Gift & Estate Tax return preparation
  - ✓ Quarterly & Year-end Payroll Tax returns
  - ✓ 1099, W-2 & Information Returns
  - ✓ E-Payment of Taxes via EFTPS & States

- **We prepare Federal & State personal & business related tax returns & related information return filings to meet required governmental compliance & deliverables.**

- **We assist our clients in tax planning measures to minimize tax liability & risk.**

**No Client Too Small!**





## Our General Accounting Services

- *We implement the general ledger, bank reconciliation & payroll reporting for the client.*

- *We establish a system for bookkeeping, & provide management reporting & analysis to accommodate the needs of the business owner.*

**No Client Too Small!**



- **Major Highlights:**
  - ✓ **Bookkeeping Services**
  - ✓ **Bank & Financial Reconciliations**
  - ✓ **Payroll Reporting & Filings**
  - ✓ **General Ledger / Journal Posting Entries**
  - ✓ **Internal Management Financial Reporting & Analysis**
  - ✓ **Administer Estates & Trusts**
  - ✓ **Executor of Estate, Trust, Power of Attorney**
  - ✓ **Financial Record Organization**
  - ✓ **Notary Public Services**

### About our CEO & President

**Joseph-Paul (JP) Timpano, CPA**



Joseph-Paul (JP) Timpano is a seasoned CPA with over 35 years diversified accounting control & solutions experience to business & consumer clients as a key provider of Eldercare Accounting Services, Consultant & Advisor Professional, and Tax/Accounting Practitioner.

In 1991 Mr. Timpano formed JPT Financial Solutions Inc., & previously from 1984 to 2010 at Citigroup held various officer positions including Solutions Lead Analyst, Global Reporting Hierarchy Coordinator, Financial Process Coordinator, Financial Analyst, & MIS Production Manager.

### JPT FINANCIAL SOLUTIONS, INC.



We are committed to your privacy & retaining your trust. As ethical practitioners, we will keep your financial matters private. Our mission is to serve the public with high standards of honesty and integrity.



Thank you in advance for giving us the opportunity to serve you. May God richly bless you!



**We're Here to Help You!**