



# *Sharp Tax & Financial Services, Inc.*

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## *Customer Service & Fee Expectations*

Sharp Tax & Financial is a place where individuals, small businesses, and real estate investors can get individualized attention for their tax and financial needs. We believe the best approach to saving you money is found in an annual “process” rather than a “point-in-time” approach. Efficient methods of saving you tax dollars & increasing your net profits should be utilized year round rather than just at tax time. The decisions you make now can have a profound effect on your profits throughout the year and the amount of taxes you pay! The challenging part is that most of these decisions cannot be undone at tax time.

Don’t go through the year without the information necessary to determine if you are making the “best” decisions for you, your family, and your business. If you are serious about increasing your profits & productivity, and saving tax dollars along the way, read the sections below to learn how we can help you achieve greater success.

### **Tax Preparation & Planning**

Just like two people, no two tax returns are alike. We take the time to consider each client’s situation in our problem solving. Our goal is to minimize your tax obligations by applying the tax laws appropriately. For more involved returns (outside simple W-2’s), the money we save our clients in taxes far exceeds the fee that we collect. Our fee is based on a combination of the type of forms required, the knowledge applied and the time spent to reduce your tax burden. Organized and complete information provided by you **saves us time and you money!** During tax season our fees could range from \$75-100 per hour. The question isn’t what we charge, but what we save you. For example, does it make sense if we collect an extra \$100 if that extra effort saves you \$500? Would you trade \$200 to save \$1,000? Etc, etc. Also, we do not promote expensive & often unnecessary financial products (i.e. refund loans, audit guarantees, lottery ploys, etc.).

### **Business Consulting**

We can assist you in deciding which type of entity fits your situation and help with the paperwork to establish and maintain it properly. The two most important aspects of deciding on an entity are the tax ramifications and the legal protection it would provide. The fee for tax consulting in this manner would be \$75 per hour for advice or a flat fee starting at \$350 to help you set up your entity.

### **Bookkeeping/ QuickBooks Set-up**

Good records are a necessity as a business owner. Without them you don’t know where you stand and you risk paying too much in taxes. Whether you need someone to completely take over your books or you just need help getting started, we have a solution for you. Our fees will depend on your needs. Call our office to schedule a no obligation-no cost appointment to see how we can help you!

### **Payroll**

Our impressive payroll system is similar to an online banking interface which can be utilized online 24/7. After the initial setup, even the most computer challenged can be up and running almost effortlessly! You enter the front side payroll (employee hours & rates) into an easy to use online form, and we file your quarterly and annual employer taxes (including W-2’s and 1099’s). Employees’ checks can be computer printed, handwritten, or direct deposited into employee’s bank accounts. Most importantly, you and your employees have online access to the applicable payroll & paycheck reports as needed. No more getting billed for a 50+ page payroll report you won’t ever use! Also included are e-mail reminders to help assure no late tax penalties. Again, our pricing depends on your particular needs.