

# TAX

Most business owners know their business type - "I am an LLC!" But most are not aware that there is an entity type with the IRS. What determines your tax entity?

- How many owners are there
- How much revenue do you project
- Do you have employees & payroll

Consulting with a tax professional will help you determine the most profitable tax filing status for your business.

# BOOKKEEPING

Keeping records is required for your taxes but numbers tell the story. Understanding your financial position will provide answers to your questions:

- How do I best manage cash
- Can I afford to hire more employees
- Am I able to invest in new equipment
- Can I offer healthcare to my employees

Investing in a quality bookkeeping service will provide you with accurate budgeting, forecasting and planning.

# PAYROLL

Paying your employees is one of your most difficult jobs as an employer. Hiring a payroll professional who understands the laws and requirements will save you from making a costly mistake.



welcome to your

# ACCOUNTING DEPARTMENT

Tax • Bookkeeping • Payroll  
Accurate • Consistent • Timely



- 🏠 [cfo.team](http://cfo.team)
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find out more at [cfo.team](http://cfo.team)  
or call **727-828-9945**

# ALL YOUR ACCOUNTING NEEDS UNDER ONE ROOF

Our packages are based on business complexity, size, transactions, number of employees and bank accounts. Every package includes bookkeeping, payroll, reporting, and business tax return. There is no long-term contract or start-up fees. Our packages start as low as \$975/mo.



CONTRACTOR	PROFESSIONAL	FRANCHISE	CFO ON DEMAND
<ul style="list-style-type: none"> <li>• Set up bookkeeping software</li> <li>• Service/work order software management</li> <li>• Pick up services for paperwork</li> <li>• Paperwork organization and filing</li> <li>• Set up accounts payable</li> <li>• Recording and reconciling of parts/ tools/equipment invoices</li> <li>• Bill payments</li> <li>• Customer invoicing and collection</li> <li>• Receive, process and make bank deposits</li> <li>• Cash planning and management</li> <li>• Payroll processing</li> <li>• New employee onboarding</li> <li>• 1099 for independent contractors</li> <li>• Sales tax if applicable</li> <li>• Banking and insurance assistance</li> <li>• Monthly financial reporting and review</li> <li>• Budgeting</li> <li>• Tax planning and projections</li> </ul>	<ul style="list-style-type: none"> <li>• Set up bookkeeping software</li> <li>• Practice/firm software management</li> <li>• Pick up services for paperwork</li> <li>• Paperwork organization and filing</li> <li>• Set up accounts payable</li> <li>• Inventory management</li> <li>• Bill payments</li> <li>• Customer invoicing and collection</li> <li>• Receive, process and make bank deposits</li> <li>• Cash planning and management</li> <li>• Payroll processing</li> <li>• New employee onboarding</li> <li>• 1099 for independent contractors</li> <li>• Sales tax if applicable</li> <li>• Banking and insurance assistance</li> <li>• Monthly financial reporting and review</li> <li>• Budgeting</li> <li>• Tax planning and projections</li> </ul>	<ul style="list-style-type: none"> <li>• Compliance with franchise agreements such as monthly royalty reporting, KPI's</li> <li>• Benchmark ratios such as cost of sales and cost of labor calculations</li> <li>• New location selection and build out – construction management</li> <li>• Set up bookkeeping software</li> <li>• Pick up services for paperwork</li> <li>• Paperwork organization and filing</li> <li>• Set up accounts payable</li> <li>• Inventory management</li> <li>• Bill payments</li> <li>• Cash planning and management</li> <li>• Payroll processing</li> <li>• New employee onboarding</li> <li>• Sales tax if applicable</li> <li>• Banking and insurance assistance</li> <li>• Monthly financial reporting and review</li> <li>• Budgeting</li> <li>• Tax planning and projections</li> </ul>	<ul style="list-style-type: none"> <li>• Assessment of current bookkeeper and administration team</li> <li>• Assessment of financial health</li> <li>• Hiring and selection of new bookkeeper/accountant</li> <li>• Long term budgeting and planning</li> <li>• Software selection and implementation</li> <li>• Process automation</li> <li>• Policy and procedure documentation and implementation</li> <li>• Preparation of year end audit or review</li> <li>• Financial loan assistance</li> <li>• Establishment of vendor terms</li> <li>• Management of inhouse accounting team</li> <li>• Advanced reports for decision makers</li> <li>• Financial leadership</li> <li>• Project management and special projects</li> </ul>

CONTACT US NOW FOR YOUR FREE CONSULTATION! 📞 **727-828-9945**

FIND OUT MORE ABOUT HOW WE WORK AT **CFO.TEAM**

Running your business is hard enough. Knowing & understanding your numbers shouldn't be.