



COURSE

BUSINESS & REAL ESTATE

Brian Davis
CPA, CFE, LCAM



CRASH COURSE

ONE STOP CPA

FREE



BUSINESS



REAL ESTATE

ONE STOP CPA



TAX PLANNING

TAX FILING



ACCOUNTING

BOOKKEEPING



ONE-TIME SERVICES

CONTENT LIBRARY



LIMITED OFFER

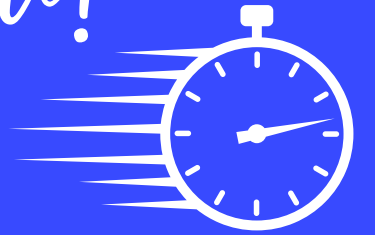


+

\$100



Thank you!



Brian Davis
CPA, CFE, LCAM



BRIAN@ONESTOP.CPA



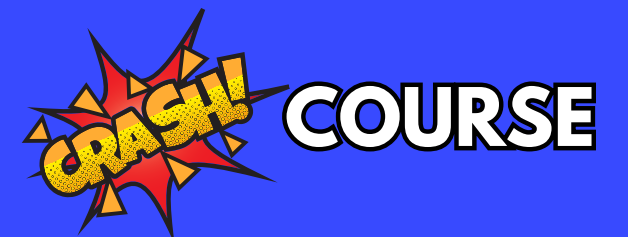
BUSINESS



REAL ESTATE



- TAX PLANNING
- TAX FILING
- ACCOUNTING
- BOOKKEEPING



WHICH BUSINESS TAX RETURN DO YOU FILE

BUSINESS STRUCTURE

BUSINESS TAX RETURN

Sole Proprietorship

Schedule C

Single-member LLC

Schedule C

Partnership

Form 1065,
Schedule K-1

Multi-member LLCs

Form 1065,
Schedule K-1

Corporations

Form 1120

LLC's taxed as S-corporations

Form 1120-S

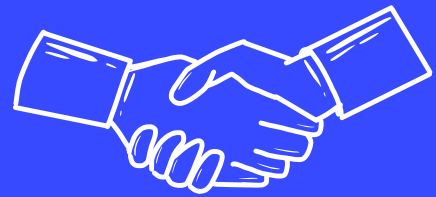
S Corporations

Form 1120-S



BUSINESS

BUSINESS STRUCTURE



S-CORPORATION

PARTNERSHIP

SOLE PROPRIETOR

SINGLE MEMBER LLC



BUSINESS

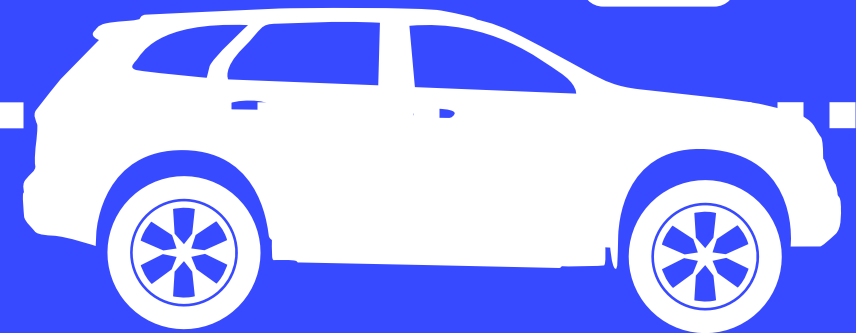
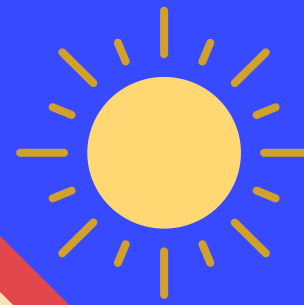
TAX DEDUCTIONS &
TAX CREDIT\$



1



2



3





BUSINESS

1



- LOWER SELF EMPLOYMENT
- LOWER INCOME TAX **Q.B.I.**
- BUSINESS DEDUCTIONS



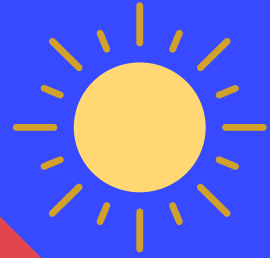
INCOME SHIFTING, TAX DEFERRALS,
RETIREMENT STRATEGIES, BUSINESS GROWTH, ETC.



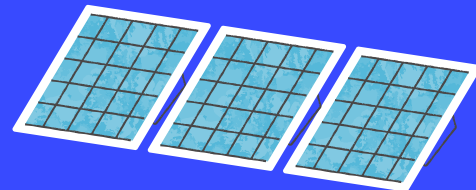
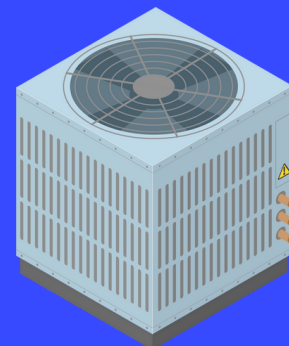


BUSINESS

2



- HOME OFFICE DEDUCTION
- or AUGUSTA RULE 
- ENERGY CREDITS

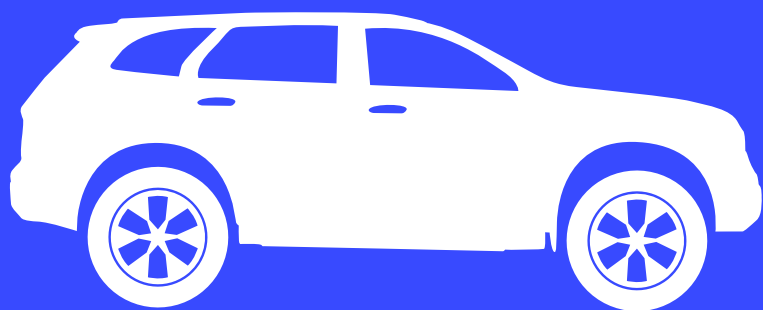



**FREE
HOME
ENERGY
AUDIT**



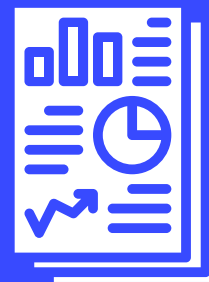
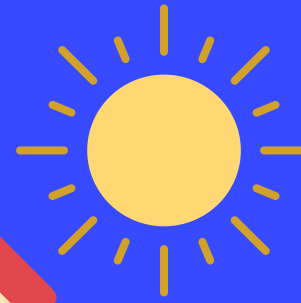
BUSINESS

3



- ACTUAL OR MILEAGE
- BUSINESS USE %, Tracking
- DEPRECIATION & SEC. 179
- ENERGY CREDITS 





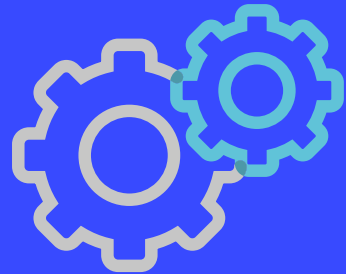
- TAX PLANNING
- TAX FILING
- ACCOUNTING
- BOOKKEEPING



BUSINESS



EXPENSES



- TAX PLANNING
- TAX FILING
- ACCOUNTING
- BOOKKEEPING

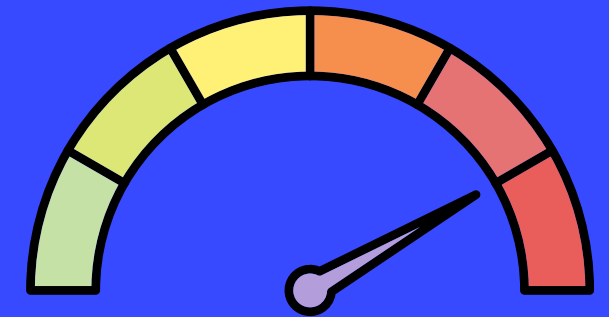


REAL ESTATE



REAL ESTATE

- DEPRECIATION
- APPRECIATION
- LEVERAGE
- TAX FAVORED





REAL ESTATE

- CAPITAL GAINS
- 1031 EXCHANGES
- B-R-R-R-R STRATEGY
- AFFORDABLE HOUSING





REAL ESTATE

- FIX-AND-FLIP 
- LONG TERM TENANTS
- SHORT TERM RENTALS
- AIRBNB, HOTELS, SPACE





REAL ESTATE +



ADD-ON SERVICES



- TAX PLANNING
- TAX FILINGS
- CALCULATIONS



REAL ESTATE

SAVE ON ACCOUNTING FEES:

FREE

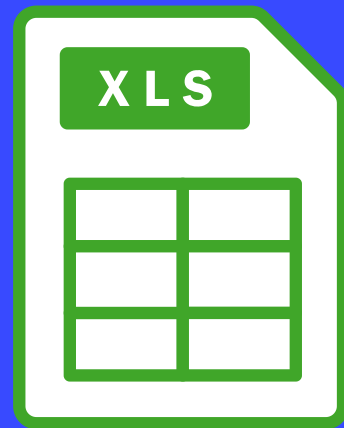


- DIY P&L SPREADSHEET
- DIY RENTAL SPREADSHEET



REAL ESTATE

- PRIMARY HOME SALE EXCLUSION



SPREADSHEET



HOW TO GUIDE



YOUTUBE LESSON





REAL ESTATE



- GOVERNMENT AGENCIES (example: IRS)
- LENDERS and/or PARTNERS
 - TO SPLIT COSTS/DUTIES/RISK
 - TO FUND/GROW/SCALE
- SEPARATE BANKING
- REALTORS or WHOLESALERS
- GC's & SPECIALTY CONTRACTORS
- PROPERTY MANAGEMENT
- MENTORS, COACHES & CONTENT



CRASH! COURSE



BUSINESS



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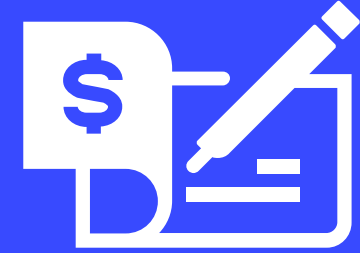
LIMITED OFFER

ONE STOP **CPA**



LIMITED OFFER

GUIDED ONBOARDING

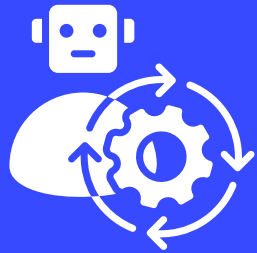


\$\$\$\$
ONE-TIME



+

\$100



gusto

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LIMITED OFFER

GUIDED ONBOARDING

OUR PROCESS



1.

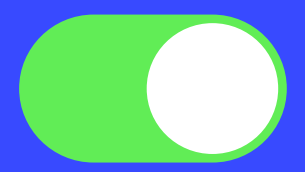
INTAKE & ONBOARDING

\$\$\$\$
ONE-TIME

\$XXX/MO+

2.

ONGOING SERVICES



QUOTED

3.

ONE-TIME SERVICES



FREE

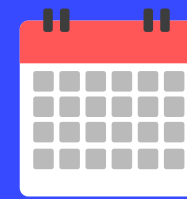


FAQ's, REFERRALS, GUIDES



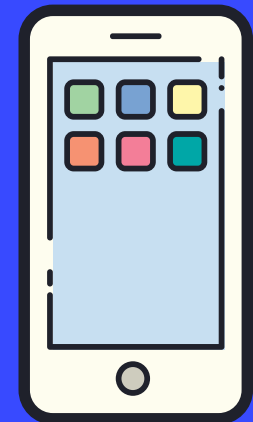
OUR PROCESS

GUIDED ONBOARDING

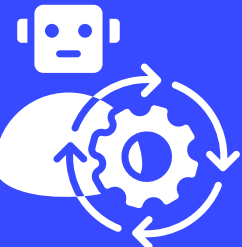


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ONE-TIME

LIMITED OFFER



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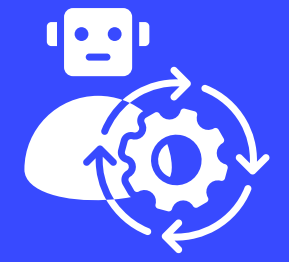


zapier

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TAX PREP CHECKLIST

RENTAL PROPERTY CHECKLIST

- | | |
|--|--|
| <input type="checkbox"/> Rental Income | <input type="checkbox"/> Mileage, Travel, Advertising, Subscriptions |
| <input type="checkbox"/> List of Rental Expenses | <input type="checkbox"/> Mortgage Interest |
| <input type="checkbox"/> Insurance Premiums | |
| <input type="checkbox"/> Real Estate Taxes Paid | |



BUSINESS CHECKLIST

- | | |
|--|---|
| <input type="checkbox"/> EIN (Tax ID) | <input type="checkbox"/> Business Use of Home (if applicable) |
| <input type="checkbox"/> Business Income and Expenses | <input type="checkbox"/> Business Bank Statements |
| <input type="checkbox"/> List of Assets and Equipment including purchase and financing docs. | <input type="checkbox"/> Credit Card & Loan Statements |
| | <input type="checkbox"/> Payroll & 1099 Filings |



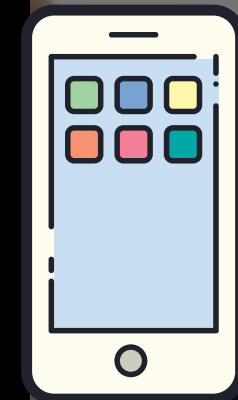
TAX PREP CHECKLIST

ALL TAX FILERS

- | | |
|--|--|
| <input type="checkbox"/> SSN and DOB (yourself and dependents) | <input type="checkbox"/> 1099 for other income forms |
| <input type="checkbox"/> Bank Account and Routing Number | <input type="checkbox"/> Health Insurance Forms |
| <input type="checkbox"/> Copy of Last year's Return | |
| <input type="checkbox"/> W2's from all employers | |

RESIDENTIAL PROPERTY OWNERS

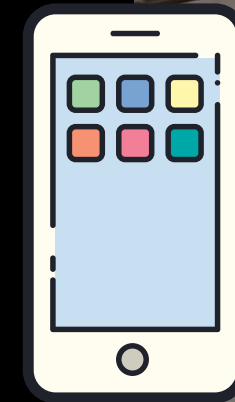
- | | |
|---|---|
| <input type="checkbox"/> 1098 Form (Mortgage Interest) | <input type="checkbox"/> Closing documents if you bought or sold for the year |
| <input type="checkbox"/> Receipt from Energy Efficient Upgrades | |



TAX PREP CHECKLIST

OTHER

- | | |
|--|---|
| <input type="checkbox"/> Retirement plan contributions | <input type="checkbox"/> Educational Expenses |
| <input type="checkbox"/> Updates to Entity Structures | <input type="checkbox"/> Updates to Banking Structure |
| <input type="checkbox"/> Sale of Stock and Ownership | <input type="checkbox"/> Additional Filings, Requests |





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TAX FILINGS



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GUIDE TO:

1. DEADLINES
2. TRANSCRIPTS
3. PENALTIES
4. PAYMENT PLANS
5. STAYING COMPLIANT

CONTENT LIBRARY

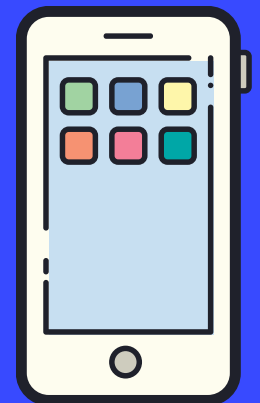
- TAX STRATEGIES
- TAX PREPARATION TIPS
- TAX PLANNING GUIDES
- TAX PROJECTIONS
- REAL ESTATE CALCULATIONS
- RETIREMENT ROADMAPS
- BUDGETS & FORECASTS

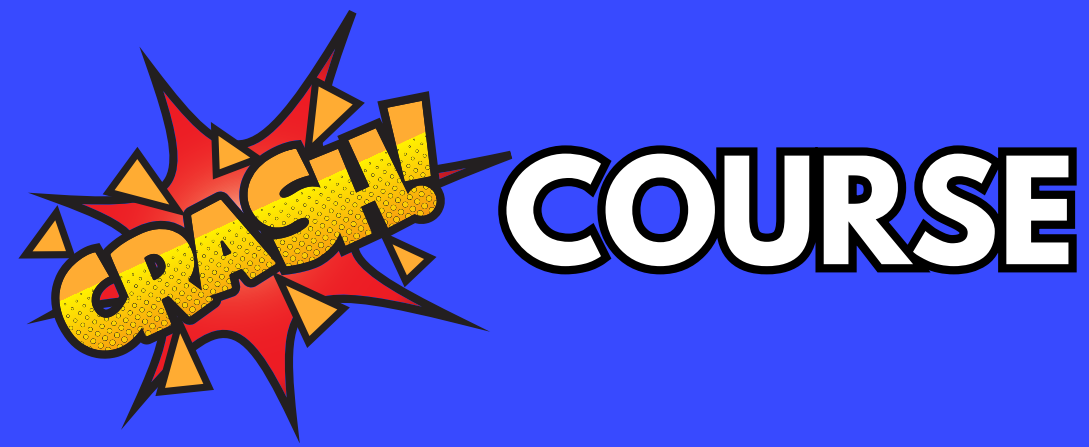
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Thank
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