

**S-CORP ESSENTIALS**  
Tax & Banking Mastery

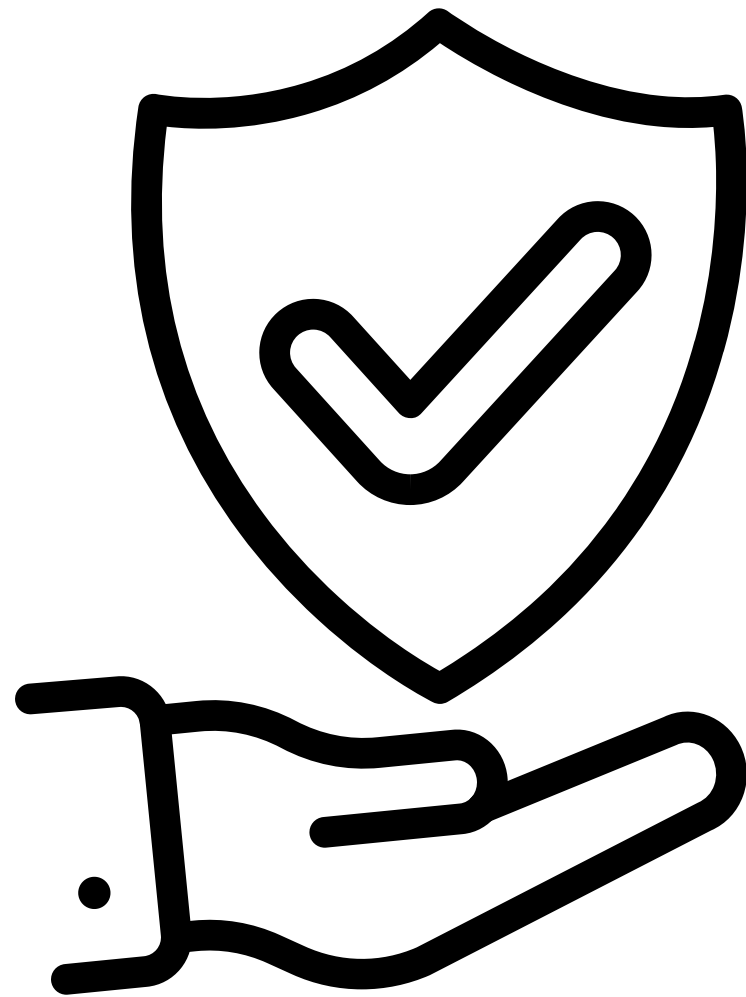
**BONUS**

# TAX PLANNING

[WWW.ONESTOP.CPA](http://WWW.ONESTOP.CPA)

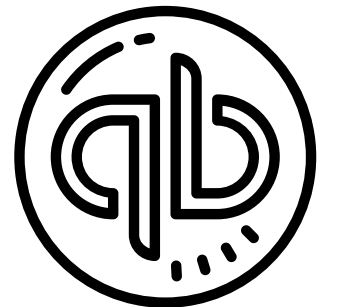


# RECOMMENDED SERVICES



## PREREQUISITES:

- Payroll Automated
- Bookkeeping Automated
- Tax Ready Financials
  - Balance Sheet,
  - Profit & Loss,
  - Cash Flow,
  - Ledger
- THEN TAX PLANNING!



# TAX PLANNING

## PREREQUISITES:



- **What taxes are due?**
- **What deadlines, and penalties?**
- **What is this years Marginal Rate (%)**
- **THEN during a Tax Planning session:**
  - **An estimate of your Projected Annual Taxes**
  - **Upcoming estimated tax payment amounts**
  - **Salary and Adjustment to Wages, Deadlines**
  - **Payments to Management Companies and IRA's**
  - **Ongoing Financials**
    - **Balance Sheet, Profit & Loss, Ledger**
    - **Employee Benefits and S-Corp savings**
    - **Home Office, Depreciation, Business Deductions**
    - **Income Planning, KPI's, Target**

**S-CORP ESSENTIALS**  
Tax & Banking Mastery

**BONUS**

**TAX PLANNING**  
**MAX**  
**RETIREMENT**  
**SAVINGS**

# MAXIMIZING Retirement Savings... WITH TAX PLANNING



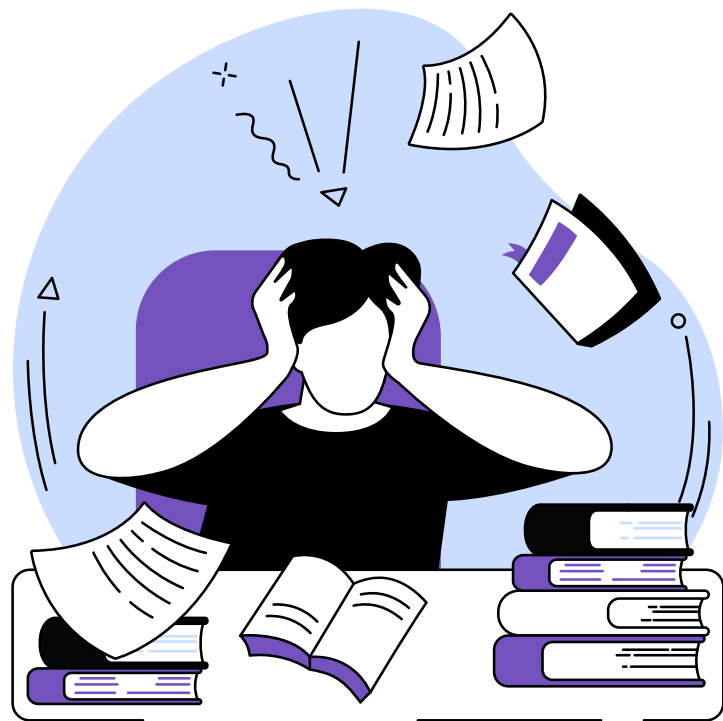
- Traditional IRA, Roth IRA, SEP IRA or Solo 401(k)
- Most financial services (banks) can set this up for you
- Setup account before **December 31st** (to take a tax deduction)
- FUNDING is usually due at the time of filing
  - depending on your tax strategy and financial position
  
- We CAN:
  - provide tax advice on the advantages and disadvantages of contributing to the various retirement account options
  
- We CANNOT :
  - provide financial advice regarding where you should invest these funds (Index Funds, Stocks, Bonds, Self-Directed, etc.)





# UPKEEP

- **Startup Costs, f2553 & f1120S,**
- **Payroll processing, W2s, 1099s,**
- **State Registrations, UI, NHR, LBT, +**
- **1st Accountant Bookkeeper-staff**
- **2nd Accountant Tax Advisor-manager**
- **3rd Accountant CFO-partner**
- **Employees, Contractors, Software**
- **CRM, Automations, etc.**



## **S Corp “Upkeep”**

Form 2553

LLC

Form 1120s

Minutes

Payroll

Additional Tax Return

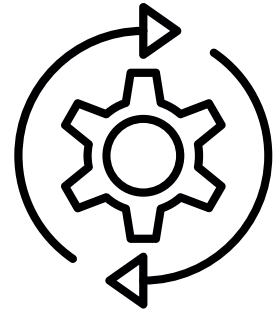
## **-TAXES, ETC.**

- **CPA**
- **PAYROLL**
- **TAXES**



**TAX PLANNING**

**PREREQUISITES**



# TAX PLANNING

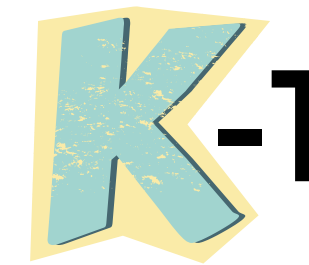
PREREQUISITES:



 **BOOKS** 



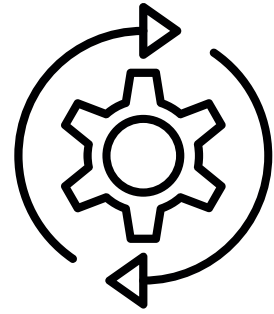
 **1120S** 



 **PAYROLL** 



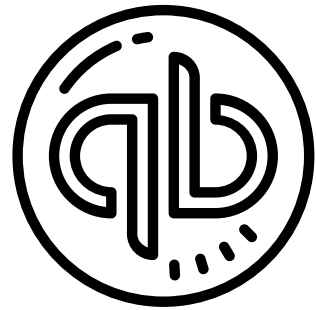




# TAX PLANNING

PREREQUISITES:

## MONTHLY W/AUTOPAY



 **QUICKBOOKS**

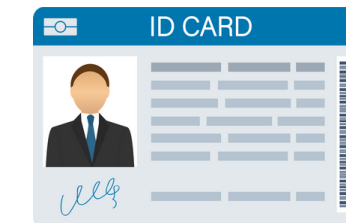


 **TAX DOME**  

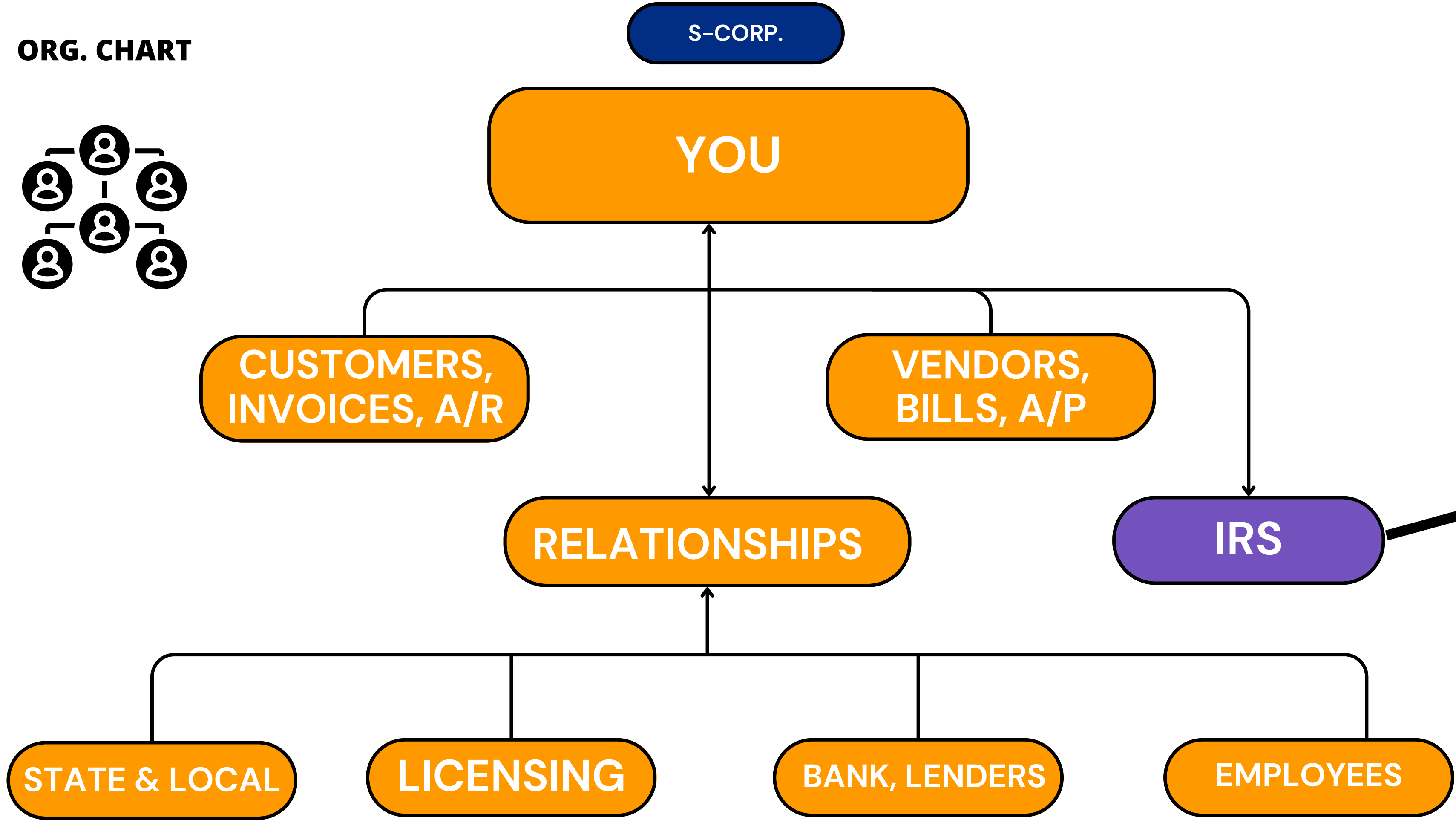
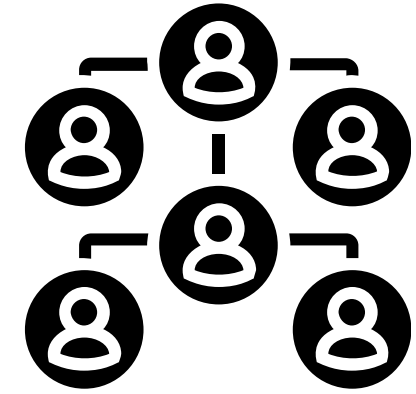
FREE CLIENT PORTAL

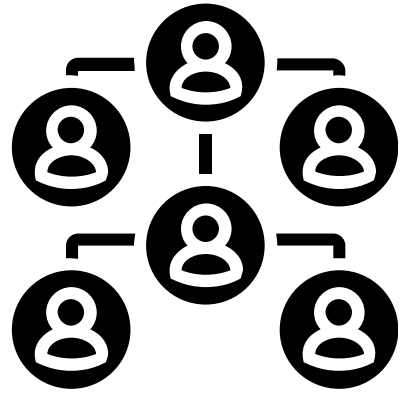


 **gusto**  



**ORG. CHART**





S-CORP.

ONE STOP **CPA**

PAYROLL

TAXDOME

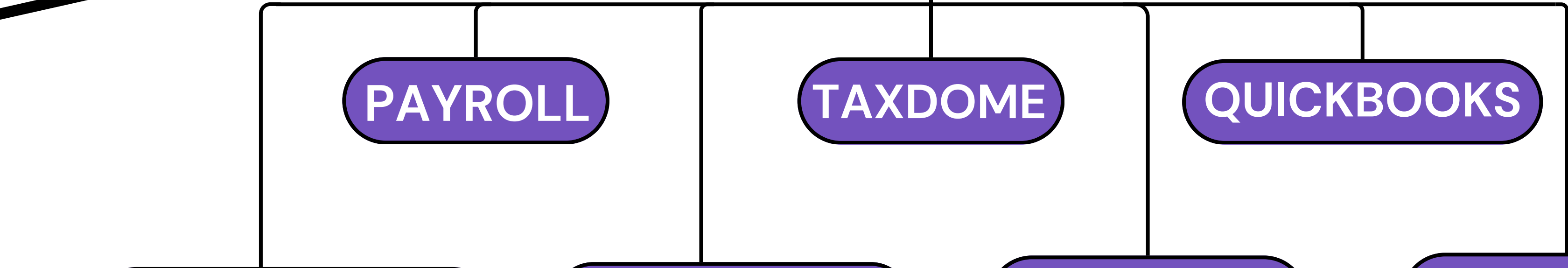
QUICKBOOKS

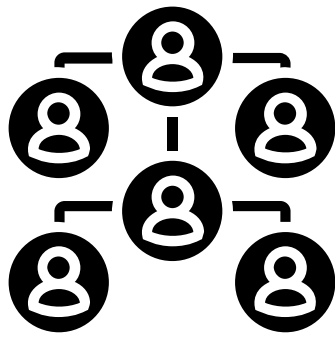
S-CORPORATIONS

IRS COMPLIANCE

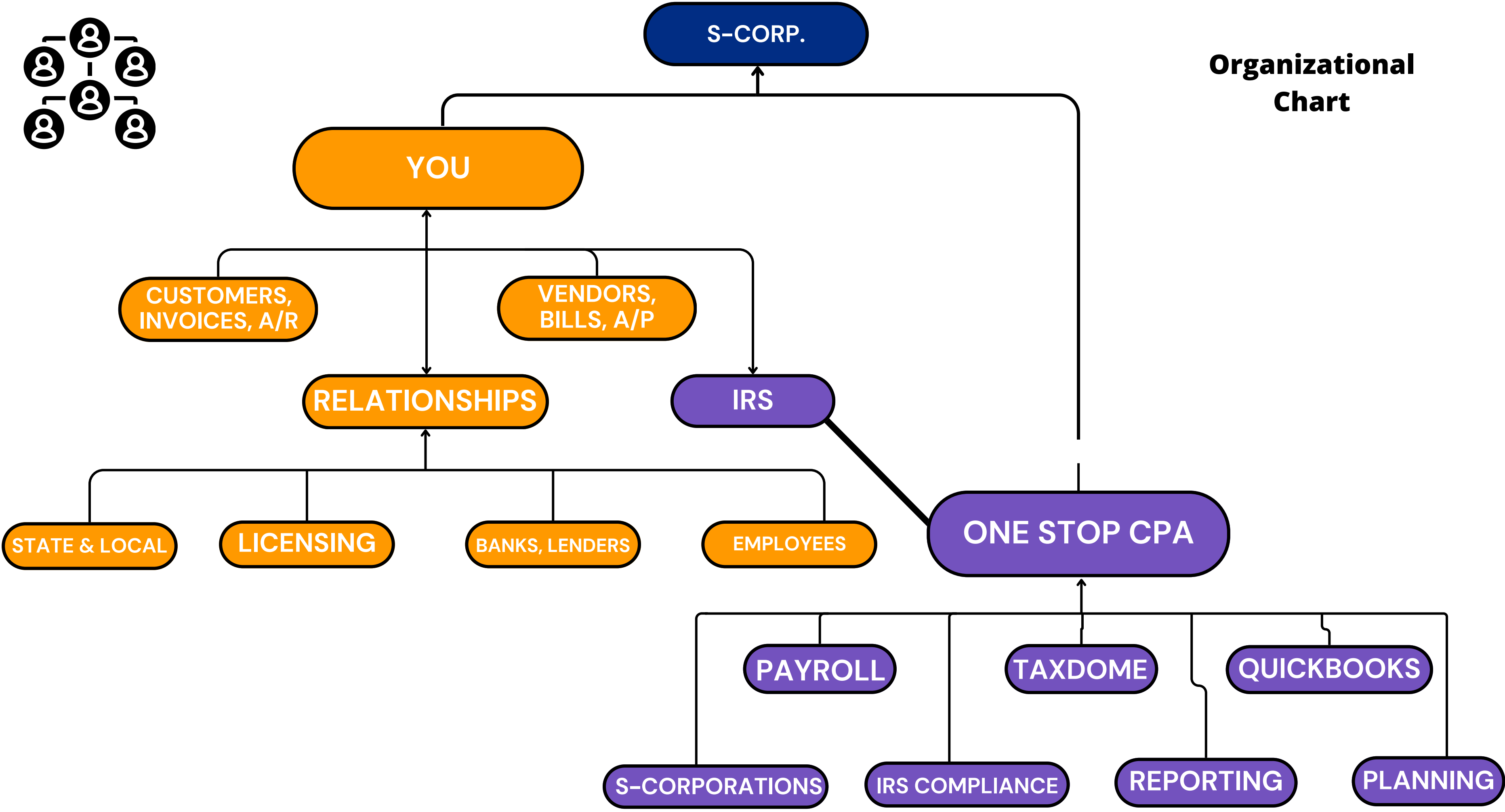
REPORTING

PLANNING





# Organizational Chart



# MENU OF SERVICES

## EDUCATION

**\$1,200** ONE-TIME

- VIDEO COURSE BUNDLES
- TAX STRATEGIES
- TEMPLATES, FAQs, GLOSSARY
- DIGITAL DELIVERY
- MOBILE APP
- GROUP COACHING CALLS
- LIVE Q&A
- REPLAYS

## TAX PREPARATION

**\$1,800+/YEAR**

- FEDERAL & STATE RETURNS
- 1120S, 1065, BUSINESS FILINGS
- 1040 PERSONAL FILING W/SCH E.

## TAX PLANNING

**\$3K-\$10K**

**VARIES** ONE-TIME & ONGOING

- 4x 1 HR. CPA TAX PLANNING CALLS
- TAX PLAN DELIVERABLE
- TAX PROJECTIONS
- PRIOR-YEAR TAX RETURN ASSESSMENT
- E-MAIL & CHAT SUPPORT
- IRS LETTER REVIEW

## ACCOUNTING

**\$XXX/MO+**

- FINANCIAL STATEMENTS
- BOOKKEEPING
- KPI ANALYSIS

# **EDUCATION** **\$1,200** ONE-TIME

---

- VIDEO COURSE BUNDLES
- TAX STRATEGIES
- TEMPLATES, FAQs, GLOSSARY
- DIGITAL DELIVERY
- MOBILE APP
- GROUP COACHING CALLS
- LIVE Q&A
- REPLAYS

**Convenient learning for clients**  
**Anytime, Anywhere!**



**KAJABI**

# TAX PLANNING VARIES \$3K-\$10K

ONE-TIME & ONGOING

- 4x 1 HR. CPA TAX PLANNING CALLS
- TAX PLAN DELIVERABLE
- TAX PROJECTIONS
- PRIOR-YEAR TAX RETURN ASSESSMENT
- E-MAIL & CHAT SUPPORT
- IRS LETTER REVIEW
- AI SWIPE FILE, CUSTOM GPT's
- Much More.....

 TAXDOME

 ZOOM

 LOOM

# **TAX PREPARATION** **\$1,800+/YEAR**

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- FEDERAL & STATE RETURNS
- 1120S, 1065, BUSINESS FILINGS
- 1040 PERSONAL FILING W/SCH E. INCLUDED



**TAXDOME**

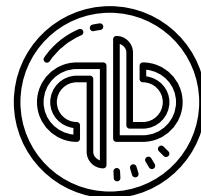


# ONESTOP.CPA SERVICES

**ACCOUNTING \$XXX/MO+**

---

- FINANCIAL STATEMENTS
- BOOKKEEPING
- KPI ANALYSIS



**QUICKBOOKS**

# MENU OF SERVICES

## EDUCATION



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## TAX PLANNING

**VARIES** ONE-TIME & ONGOING **\$3K-\$10K**

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## ACCOUNTING



**\$XXX/MO+**

- FINANCIAL STATEMENTS
- BOOKKEEPING
- KPI ANALYSIS

# ONGOING SERVICES

## ACCOUNTING

**S-CORPORATION BUNDLE  
W/TAX PREP.  
\$XXX/MO.**

### S-CORPORATION BUNDLE

- ✓ ACCOUNTING (1 ENTITY, UP TO 4 ACCOUNTS)
- ✓ TAXDOME CLIENT PORTAL (FREE)
- ✓ INCLUDES **TAX PREPARATION** (1120S)
- ✓ INCLUDES **BOOKKEEPING**

ADD-ONS (NOT INCLUDED):

- QUICKBOOKS ONLINE ADD'L (\$+)
- PAYROLL PROCESSING ADD'L (\$+)

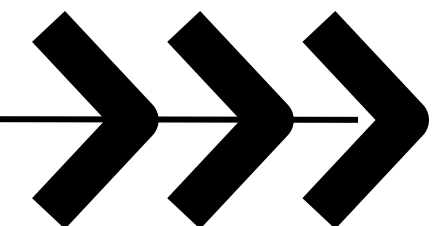
- ✓ PRIOR-YEAR TAX RETURN ASSESSMENT
- ✓ BASIC TAX PLANNING
- ✓ BASIC FINANCIAL STATEMENTS
- ✓ +TAX TIPS & STRATEGIES
- ✓ +GLOSSARY
- ✓ +FREE TEMPLATES



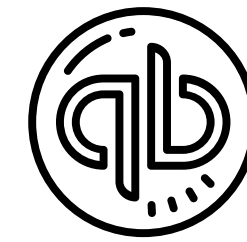
## TAX PREPARATION

~~\$1,800+~~/YEAR

- FEDERAL & STATE RETURNS
- 1120S, 1065, BUSINESS FILINGS
- FINCEN FILINGS, IRS REPRESENTATION
- PERSONAL 1040 W/SCH. E INCLUDED



# ONGOING SERVICES



**gusto**

## ACCOUNTING

### S-CORPORATION BUNDLE W/TAX PREP. & SOFTWARE

**\$XXX/MO.**

#### S-CORPORATION BUNDLE

- ✓ ACCOUNTING (1 ENTITY, UP TO 4 ACCOUNTS)
- ✓ TAXDOME CLIENT PORTAL (FREE)
- ✓ INCLUDES **TAX PREPARATION** (1120S)
- ✓ INCLUDES **BOOKKEEPING**
- ✓ QUICKBOOKS ONLINE (ESSENTIALS)
- ✓ PAYROLL PROCESSING (GUSTO)

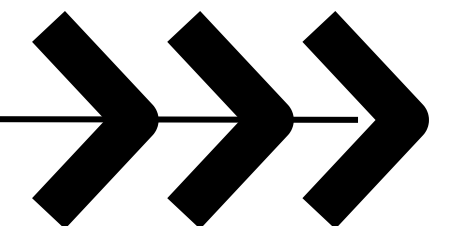
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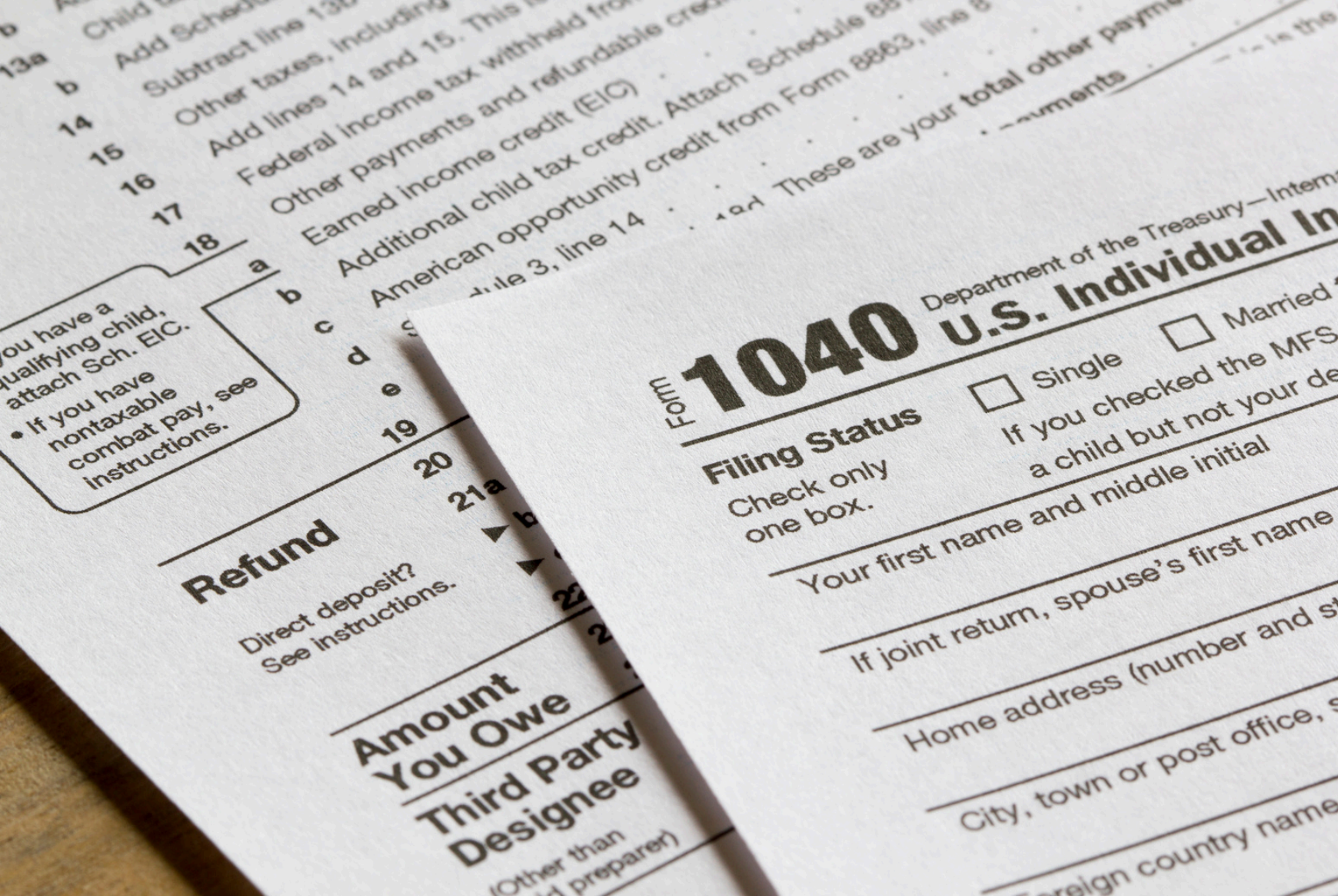


## TAX PREPARATION

~~\$1,800+~~/YEAR

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- 1120S, 1065, BUSINESS FILINGS
- FINCEN FILINGS, IRS REPRESENTATION
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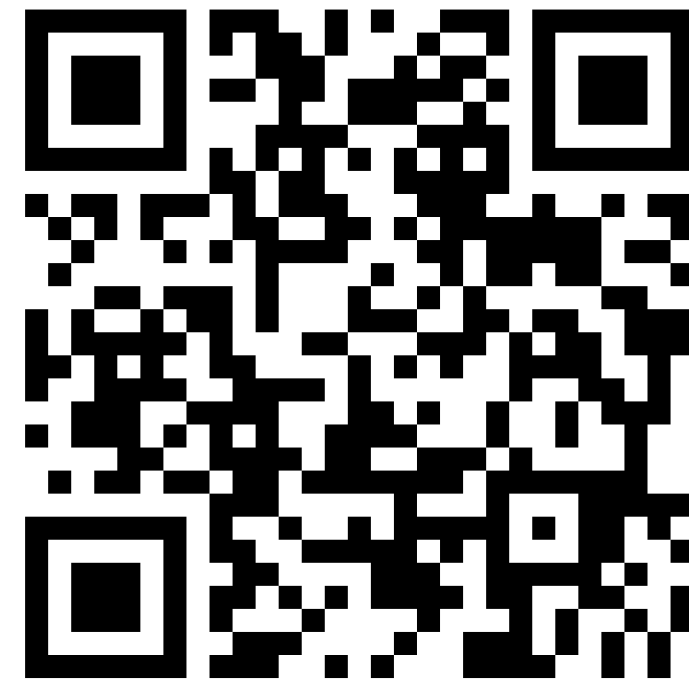
# ANNUAL PERSONAL FILINGS

- **Personal Tax Filing (Form 1040 w/Schedule E):**
  - **After the year is closed, your payroll filings and income tax filings will be prepared.**
  - **Once your personal tax forms are in, you upload those through TaxDome.**
  - **W2s, 1098, 1099s, Spouse, Dependent, etc.**
  - **Predictable Balance Due or Refund. (1040 With Tax Planning)**

# GETTING STARTED



**BRIAN DAVIS, CPA**



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*Thank you!*