Spies Tax Connections
TAILORED TAX SERVICES

Basic Bookkeeping & Accounting

Starting $500 / Month

Client Size 0-20 Employees

Compliance Tax Planning

Virtual Meeting 1x / Month

Annual Meetings

Email (5 Day Response Time)

1.) QuickBooks Setup: (One Time)

- Link Accounts to QB's *(Banks, Square, Stripe, Avalara, Housecall Pro, Amazon, Etc.)*
- Set up Chart of Accounts
- Set Rules and Classes
- Track Income & Expenses
- Track Miles Correctly
- Maximize Tax Deductions
- Employee/Contractor GPS time & Location Tracker

2.) Preparing QuickBooks Reports Such As: (Quarterly)

- Profit & Loss Reports
- Accountant & Tax Reports
- Balance Sheet
- Banking Reports
- Banking Reconciliation
- Class Tracking
- Custom Financial Reports
- Customers & Receivables Reports
- Employees & Payroll Reports
- Expenses & Vendors
- Inventory Reports
- Jobs, Time & Mileage
- Purchase & Sales Reports
- QuickBooks Projects *(Track Labor Costs & Profitability of Jobs)(Add on)*

3.) Payroll Services (Bi-Weekly/Monthly) (Add on)

- Set Up Employee Payroll
- Entering Time Sheets
- Processing Employee Payroll
- Process Monthly and/or Quarterly Shareholder Distributions
- Uploading Third Party Payroll Reports
- Manage Accounts Payable & Receivables
- Collect Overdue Receivable
- Prepare Monthly, Quarterly & Yearly Payroll Taxes with Taxing Authorities

Creighton Spies EA

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Schedule an Appointment:

https://calendly.com/spiestax