

Carlotta THOMPSON & Associates

As the nation's first accounting firm to offer clients tax strategy and implementation with our team of tax strategists and financial coaches, we focus on helping small business owners put more money in their own pockets through "audit-proof" accounting which emphasizes proactive, not reactive, strategies that are lacking at most of America's accounting firms.

As a former IRS agent, my opinion is that the reason so many businesses fail is because they are paying too much in taxes.

I have witnessed small business owners hire the best accountants and best tax lawyers, however at the end of an audit, they have left with a tax bill so large that it shuts down their entire business.

Unfortunately, most small businesses overpay their taxes so much that it makes it impossible for their business to survive.

Our most popular program is our VIP Package. This program is designed for small businesses generating at least \$200k up to \$50M. We create a tax strategy plan for you and implement and infuse that each month into your bookkeeping, tax prep and CFO services creating a holistic approach to help you pay the least taxes legally possible.

	Package Details	VIP
Bookkeeping	Monthly Bookkeeping Data Entry 2021	Weekly
	Monthly Account Reconciliation	Monthly
	Monthly Financial Statements. (Income Statement and Balance Sheet)	Monthly
CFO Calls	Monthly CFO Calls or Videos if you prefer	x
Tax Prep	Individual Tax Prep (Form 1040), one owner 2021	x
	S Corp or Partnership Tax Prep 2021	x
Tax Strategy	Strategy Infused Tax Compliance	x
	S Corp Election	x
	Section 199A Small Business Tax Deduction Optimization Strategy	x
	S Corp Reasonable Compensation Study Strategy	x
	Retirement Contribution Calculation Strategy	x
	Implement Carlotta's Top 20 Strategy Picks	x
	Advanced Tax Strategies	
	Initial Custom Tax Strategy Plan	x
	Tax Strategy Review every 6 months	x
	Tax Strategy Infused Accounting	x
Tax Planning	Tax Concierge - ask financial and tax questions as they arise	x
	Personal one on one access to Carlotta	
Tax Planning	Annual Year-End Tax Planning & 1 hour Consulting	x
	Mid-Year Tax Planning & 1 Hour Consulting	x
Payroll/1099	Unlimited 1099 Preparation 2021	x
	Payroll Setup and Support including quarterly returns (this does not include the fee charged by the provider)	x
Tax Protection	IRS Audit Defense	x
	Year-round Quarterly Tax Payment Calculations	x
	Tax Compliance Study	x
Wealth	Profit Pathway	x
	Wealth Strategy	x



To learn how this program can help your small business, book a call with one of our tax strategists at carlottathompson.com

Tax Strategy
IMPLEMENTATION