Tax Consultation

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The Watson CPA Group offers tax planning and preparation in-person, via telephone or with Skype. We love to Skype- faces, inflections, all the good stuff for our long distance clients. Heck, even people in the same building seem to prefer a phone call or Skype.

Topics of Discussion

What do you want to chat about? You probably have a good list of things on your mind, and that usually springboards into other topics. In general, we try to touch on high level issues such as tax savings and planning, income modeling, capital gains, rental properties, tax deductions and deferrals, retirement plans, trusts, long-term care, estates and probate, just to name a few. Really!

For business owners, our **Periodic Business Review (PBR)** is a wonderful agenda and is a good place to start. For families who are looking for ways to minimize taxes and plan for the future, our **Tax Planning and Financial Tune Up Agenda** is an equally good place to start.

Our job is to serve you. And to do that, we need to discover your goals and find out where you want to be. Next we find holes in your financial or business life, and unveil problems and predicaments that are getting in the way of reaching your objectives. And finally we need to continuously evaluate the plan and tweak as necessary. You know this of course- but you also know that you might need an objective outside voice.

And as Clint Eastwood once said in Dirty Harry, “A man’s got to know his limitations”. In other words, we are not interested in billable hours. We are only interested in providing you with sound advice. So if we feel that we cannot comprehensively and accurately deliver the information you need, we will provide referrals of other trusted professionals.

Click on the buttons below to read about our business consultation services including Period Business Reviews and Year-End Tax Planning. Anyone can balance a checkbook or put the right numbers on a tax return, but proper consultation is necessary to stay ahead of the tax obligations and understand business nuances.Please use the form below to tell us a little about yourself, and what you have going on. We look forward to talking to you!

Name (required)

Email (required)

Business Name (if applicable)

Message

Phone Number (slightly required so we can stalk you)

State

Submit

Our fee is $150 for 40 minutes (such a deal for you!). If we decide to press forward with an engagement, we will **credit the $150 towards future services**. If you don’t need convincing and already want our services such as individual tax return preparation, and you simply have some housekeeping questions, we answer those at no charge. Charging a consult fee to tell you how great we are is not cool.

Consultations are scheduled on weekdays during the work day. Yes, we can accommodate other days and after-hours, but those are reluctantly agreed to after some eye-rolling and complaining. We will answer your questions to determine three things-

- Do you need our help?
- Can the Watson CPA Group and its **support staff** help you?
- Can we work together as a collaborative partnership?

From there we can determine the best plan which might be a simple "keep on keeping on"; otherwise we will construct a malleable plan together and provide a quote for those services.

Shockingly we actually return all consultation requests via email and phone call. No black holes here!

Engagement

It is challenging to discern when an interview BY the client turns into free advice FOR the client. And more importantly we are bound by the IRS, State of Colorado and our insurance provider to not engage in offering professional advice without an engagement agreement. Darn rules.

To set up an appointment, please call our offices at 719-387-9800 or send us an email at **support@watsoncpagroup.com**, or use the form above. You can also text us at 719-345-2100. Thank you in advance for your time, and we look forward to working with you!