

## What WCG Offers

Founded by Tina and Jason Watson in 2007, WCG is not just a group of tax preparers or number crunchers-we are tax consultants and business advisors, and our firm will take you through the cycles of your personal and business lives. Not every business runs the same or has the same needs. We want to ask the appropriate questions, listen, and develop a game plan that works for you.

Many accountants are only compliance oriented, and while IRS compliance is critical, being proactive is equally important. Tax planning is our middle name.

<b>Business Advisory Service Plans</b>	Vail	Telluride	Aspen
2020 Tax Planning and Preparation			
Tax Planning, Tax Projection Worksheets, Expat Add-On	$\checkmark$	$\checkmark$	$\checkmark$
Small Business Tax Deductions Optimization	$\checkmark$	$\checkmark$	$\checkmark$
Section 199A QBI Tax and Salary Optimization	$\checkmark$	$\checkmark$	$\checkmark$
Estimated Tax Payments (done thru payroll)	$\checkmark$	$\checkmark$	$\checkmark$
Business Entity Tax Prep (Form 1065, 1120, 1120S)	$\checkmark$	$\checkmark$	$\checkmark$
Individual Tax Prep (Form 1040), One Owner	$\checkmark$	$\checkmark$	$\checkmark$
Expat / Foreign Income Calcs (Form 2555, FBAR, Form 8938)	Add-On	Add-On	Add-On
IRS Audit Defense	$\checkmark$	$\checkmark$	$\checkmark$
Situational Tax Law Research (up to 3 hours annually)			$\checkmark$
2020 Payroll			
Reasonable Shareholder Salary Calculation (RCReports)	$\checkmark$	$\checkmark$	$\checkmark$
Monthly Shareholder Payroll Processing (up to 3 shareholders)	$\checkmark$	$\checkmark$	$\checkmark$
Employee Payroll Processing (up to 25 employees, bi-weekly, direct deposit)	Add-On	$\checkmark$	$\checkmark$
Annual Payroll Processing (W2s, other filings, up to five 1099's)	$\checkmark$	$\checkmark$	$\checkmark$

Continued...

Business Advisor		Vail	Telluride	Aspen
Consulting				
Business Consultation, Periodic Business Reviews (PBR)		Quarterly	Unlimited	Unlimited
Complimentary Quick Chats (CQC)		Unlimited	Unlimited	Unlimited
Interfacing with Lenders, Attorneys, Financial Planners			Unlimited	Unlimited
Financial Analysis				
QuickBooks, Xero Consulting			$\checkmark$	$\checkmark$
Fractional Controller (Bench Bookkeeping)		Add-On	Add-On	Add-On
Financial Statements Analysis, Comparisons			Quarterly	Quarterly
Cash Flow Management and Analysis				$\checkmark$
First Research Industry Reports, Industry-Focused Consult	ing			$\checkmark$
National and Metro Economic Reports				$\checkmark$
KPI Analysis, Benchmarking, Hot Sheets, Trend Analysis				$\checkmark$
Budgeting, Forecasting, Goal Setting				$\checkmark$
Strategy and Maintenance				
C-Level Financial Advice and Strategic Planning (Fractional G	CFO)			$\checkmark$
Succession Planning, Ownership Changes Consultation				$\checkmark$
Annual Business Valuation				$\checkmark$
Annual Corporate Governance, Resolutions, Meetings			$\checkmark$	$\checkmark$
	Annual Fee	\$3,180	\$5,580	\$8,160
	<b>Monthly Fee</b>	<b>\$265</b>	\$465	\$680

(fees may be prorated based on onboarding date)

Unlike the modern-day new car packages, our Business Advisory Service plans can be customized specifically for you. The array above is simply a starting point. We are not salespeople; we are consultants. We are not putting lipstick on a pig expecting you to love it. Our job remains being professionally detached, giving you information and letting you decide.

Moreover, our goal at WCG is to always prepare comprehensive and accurate financial reports, filings and tax returns; however, equally important is your understanding of how this stuff "works". To the extent necessary, we want you to be comfortable with your tax and accounting world so together we can successfully plan for your future. We get to peek in for a handful of hours; you live it every day!

Thank you in advance for the opportunity to serve you!



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