

## Referrals

WCG has selected the following trusted providers for bookkeeping, sales tax, health insurance including HSA / HRA, legal representation, 401k / cash balance plans and financial advisors. We are not affiliated with these providers and we do not receive a “kickback” or share in revenues. Each third-party provider is independent and will quote fees for their services. However, if you find that the service levels you have come to enjoy from WCG is not being replicated by a provider, please let us know.

### Bookkeepers

180 Accounting (local to us, good for complex situations)

Jerry Lomax

jlomax@180accounting.com

[www.180accounting.com](http://www.180accounting.com)

719-495-9688

Bench (online, good for small transactions)

help@bench.co

<https://bench.co/partner/watson-cpa/>

888-760-1940

**WCG can also perform bookkeeping as a monitor (Fractional Controller). We use 180 Accounting and Bench as our engines, but we do all the interfacing, monitoring and financial statement delivery. Please ask about this hands-off option.**

### Sales Tax

TaxJar

[www.taxjar.com](http://www.taxjar.com)

Avalara

[www.avalara.com](http://www.avalara.com)

Peisner Johnson (consultants, sales tax problems)

[www.peisnerjohnson.com](http://www.peisnerjohnson.com)

Avoid TaxValet

## Health Insurance / HSA / HRA and Disability Insurance

Designed Health (**health insurance**, HSA, HRA info)  
Josiah Allis  
[josiah@designhealth.com](mailto:josiah@designhealth.com)  
[www.designhealth.com](http://www.designhealth.com)  
720-445-9433

Zane Benefits (HSA, HRA info)  
[www.zanebenefits.com](http://www.zanebenefits.com)  
800-376-9185

TASC (HSA, HRA info)  
Eric Smith  
[Eric.smith@tasconline.com](mailto:Eric.smith@tasconline.com)  
[www.tasconline.com](http://www.tasconline.com)  
800-422-4661 ext 8843

Base Online (HSA, HRA info)  
[www.baseonline.com](http://www.baseonline.com)  
888-227-3105

## Attorneys (Colorado Licensed)

Colorado Law Group (these are our attorneys)

John Stinar (general biz law, operating agreements)  
[john@coloradolawgroup.com](mailto:john@coloradolawgroup.com)

Ian Burrell (general biz law, operating agreements)  
[ian@coloradolawgroup.com](mailto:ian@coloradolawgroup.com)

Chris Wilhelmi (employment law, litigation)  
[chris@coloradolawgroup.com](mailto:chris@coloradolawgroup.com)

Paul Kloster (contract law, construction, real estate)  
[paul@coloradolawgroup.com](mailto:paul@coloradolawgroup.com)

719-635-4200

Fox Rothschild LLP  
Jennifer Benda  
[jbenda@foxrothschild.com](mailto:jbenda@foxrothschild.com)  
303-446-3848

Justin Fish Legal, PC (**estate planning**)  
[justin@justinfishlegal.com](mailto:justin@justinfishlegal.com)  
719-493-9003

Sparks Willson Borges Brandt & Johnson, P.C.  
Robert Willson  
719-634-5700

Law Office of Adam Weitzel (general biz law)  
Adam Weitzel  
[adam@businesslawgroup.us](mailto:adam@businesslawgroup.us)  
719-355-8840

## Company 401k Plans, Cash Balance Plans, Self-Directed IRA

SurePayroll 401k (we use these guys for ours)  
Tim McDonald  
[tim.mcdonald@surepayroll.com](mailto:tim.mcdonald@surepayroll.com)  
[www.sure401k.com](http://www.sure401k.com)  
877-954-7873 ext 5288033

Barlow Consulting, Inc.  
Brad Barlow  
[barlowconsultinginc@gmail.com](mailto:barlowconsultinginc@gmail.com)  
412-498-6993

Polycomp (profit-sharing and DB pension plans)  
Pamela Stitt  
[pstitt@polycomp.net](mailto:pstitt@polycomp.net)  
[www.polycomp.net](http://www.polycomp.net)  
916-773-3480 ext 2025

New Direction Trust Company (**self-directed IRA**)  
303-546-7930  
[info@ndtco.com](mailto:info@ndtco.com)

## Financial Advisors, IRAs, Solo 401k Plans

WCG used to have a sister company named SFD Capital which was a Registered Investment Advisory firm. We have since transitioned away from providing that service directly, but we remain very much in tune with investment concepts and financial planning. We believe retirement is straightforward; index funds, rentals, a household budget and a plan is all most people need, yet most financial advisors complicate it in favor of high fees. This unnecessary complication is what we call the illusion of precision.

Enough soapboxing... We can help with basic retirement concepts and tax planning. In addition, Tina Watson, CPA and Sally Rhoades, CPA are also Certified Financial Planners (CFP®). However, for IRA / solo 401k setups and investment advice, we suggest the following-

Rainsberger Wealth Advisors  
Mindy Sutton, MBA, JD  
[www.RWAPartners.com](http://www.RWAPartners.com)  
[msutton@rwapartners.com](mailto:msutton@rwapartners.com)  
980 Pico Point  
Colorado Springs, CO 80905  
719-328-1944

TD Ameritrade (SFD Capital used TDA to custody assets)  
<https://www.tdameritrade.com>  
800-454-9272

Charles Schwab  
<https://www.schwab.com/>  
888-245-6864

One Brick Planning  
Aaron Connell, EA  
[aaron@onebrickplanning.com](mailto:aaron@onebrickplanning.com)  
720-575-0549

Fidelity  
<https://www.fidelity.com/>  
800-972-2155

Peace of Mind Financial Planning  
Linda Leitz, PhD, CFP®, EA  
[www.PeaceofMindFinancialPlanning.com](http://www.PeaceofMindFinancialPlanning.com)  
[linda@peaceofmindfin.com](mailto:linda@peaceofmindfin.com)  
719-836-8181