

2023 Business Entity Tax Return Checklist

Here is a quick checklist to gather the things we need for your business entity tax return. The pages following this checklist expand on the items below and provide additional details.

We need-

1. Engagement Letter wcginc.com/engagement
2. Prior Year Tax Returns (unless we prepared them)
3. Income Information (1099s, or Profit/Loss Statement)
4. Business Expenses
 - a. Common Expenses wcginc.com/621 (robust online form)
wcginc.com/22 (simplified PDF)
wcginc.com/21 (simplified Excel)
 - b. Accountable Plan Expenses (home office, cell, miles) wcginc.com/628
 - c. 401k / SEP Employer Contributions wcginc.com/621
 - d. Copies of 1099s that you filed for vendors, suppliers*
5. Balance Sheet (if you use formalized accounting) **or**
12/31/23 Business Checking Account Balance
6. General Ledger (if you use formalized accounting)
7. Payroll Details (unless we process payroll)
 - a. W-2s for All Employees and Owners, plus W-3
 - b. Payroll Details Report for the Entire Year
8. Estimated Tax Payments for the Business (if applicable)

* If you do not provide copies of 1099s that you filed and sent to vendors and suppliers, we will assume you were not required to do so (unless WCG filed them for you). Here is a link to the rules describing when 1099s are required-

wcginc.com/1099

Business Entity Tax and Financial Records **(expanded)**

The quality of your business tax return and the timeliness of its preparation depend strongly on obtaining all your tax-related documents and information. Therefore, we have created the following checklist for tax and financial records, including our secure Small Business digital forms (also available as non-fillable PDFs).

Small Business Set Up Worksheet

We have two worksheets; one for set up and another for reporting operations and financial data. The Small Business Set Up Worksheet is used for two scenarios-

- ▲ New Client to WCG. If you are new to us then this form allows us to set up your business properly in our systems such as name, IRS activity code, ownership structure etc. Sure, we can use last year's tax returns, but some things are not available or might not accurately represent today.
- ▲ Business Started Operations in 2023.
- ▲ Changes From Last Year. If any of the following things have changed during 2023 as compared to 2022, we need to update so our world matches your world-
 - Business name or address has changed.
 - Ownership percentages change, or new or exiting owners.
 - Structure or entity changes (S Corp Election, going from Sole Prop to LLC, multi-entity arrangements, etc.).

The Small Business Set Up Worksheet is available here (Yes, it's long and painful, but absolutely necessary)-

wgcinc.com/620

Small Business Operations and Financial Data Worksheet

All small business owners operating sole proprietorships or as a separate business entity (partnership, corporation, etc.) need to complete this worksheet, or at least use it in conjunction with financial statements and the like.

We commonly get the question, "**Can't I just send you my QuickBooks data?**" The answer is a "Yeah, but..." Financial statements and spreadsheets might miss critical information such as-

- ▲ Accountable Plan reimbursements,
- ▲ intended 401k or SEP IRA contributions for 2023 paid in 2024,
- ▲ multi-state issues (nexus) and income apportionment,
- ▲ estimated tax payments,
- ▲ inventory methods, etc.

We also must ask some required IRS disclosure questions about receipts and 1099 issuance. Unfortunately, income statements and balance sheets only get us so far.

The Small Business Operations Worksheet is available here-

wgcinc.com/620 (digital form)

wgcinc.com/21 (excel)

Formalized Accounting

If you use QuickBooks or MS-Excel for your accounting records, please make sure your bank reconciliations are completed and all transactions are categorized. Double check your entries after reviewing the rest of the categories on this form. We prefer to get financial data from these programs in MS-Excel or .csv formats since we can massage and manipulate them easily without ruining the integrity of the original data. We need-

- ▲ Balance Sheet for Dec 31 (and preferably another data dump for Dec 31 of the previous year).
- ▲ Profit and Loss Statement (Income Statement) for Jan 1 thru Dec 31.
- ▲ General Ledger for All Accounts (details every transaction) for Jan 1 thru Dec 31. While we can work with PDFs when it comes to Balance Sheets and Income Statements, G/L data is much easier to work with when in MS-Excel or .csv formats.

If you use online accounting software and you feel comfortable giving us access, please use **accounting@wgcinc.com** as the email address for the accountant invitation. We do not make changes or submit journal entries into your accounting records. If these are needed to be done, we can either guide you thru it or refer you to a third-party bookkeeper.

Balance Sheet Items (in addition to the data dump above)

- ▲ Bank Statements, showing January 2023 and December 2023 cash balances (we need to tie out your cash)
- ▲ January 2023 and December 2023 Credit Card Statements (including overlapping months)
- ▲ Equipment Purchases and Dispositions, Including Automobiles
- ▲ New Loans, Paid Loans, to and from the Company including PPP / EIDL information
- ▲ Loan Statements, Year-End Summaries showing Interest / Principal paid, 12/31/23 Balances

Income and Expenses (in addition to the data dump above)

- ▲ 1099 MISCs (that you received from your clients or customers)
- ▲ 1099-Ks (issued by merchant card providers, such as PayPal and Google)
- ▲ Health Insurance Premiums, Health Savings Account (HSAs), Long-Term Care (LTC)
- ▲ Health Reimbursement Arrangements (HRAs)
- ▲ Copies of 1099s that you filed for vendors and suppliers*

* If you do not provide copies of 1099s that you filed and sent to vendors and suppliers, we will assume you were not required to do so (unless WCG filed them for you). Here is a link to the rules describing when 1099s are required-

wgcinc.com/1099

Accountable Plan Reimbursements (Shared Expenses)

- ▲ Automobile Mileage, Home Office, Cell Phone, Internet

Submit these here- **wgcinc.com/628**

Payroll (you can skip if we process 1099s or payroll for you)

- ▲ 1099s, W-2s you issued including W-3s (W-3 is necessary if you have employees beyond yourself)
- ▲ End of Year Payroll Summaries showing wages paid, taxes deducted and taxes paid

You can also provide accountant login credentials and we'll get it (use accounting@wgcinc.com)

Retirement

- ▲ Plan Documents for new 401k plans (an introduction to your financial advisor is also nice)
- ▲ Amounts deferred by Employees, Contributions made by Employer (we can compute the max)

Housekeeping for New Clients :)

- ▲ Copy of your Articles of Organization, Formation or Incorporation (if you can, no biggie otherwise)
- ▲ Original EIN Issuance Letter, if you can
- ▲ Operating Agreement or Shareholder Agreement, if you have one
- ▲ S Corp Election, if you previously submitted to the IRS
- ▲ 2022 Tax Returns and all K-1s including State(s), if applicable
- ▲ Accountable Plan, As Adopted
- ▲ Bank Routing and Account Numbers (some states only accept business tax payments electronically)
- ▲ Shareholder Basis Information
 - Paid in Capital Amounts
 - Owner Full Legal Names, SSNs, Mailing Addresses, Emails, Phone Numbers, Ownership Percentages

The Small Business Set Up Worksheet is available here (Yes, it's long and painful, but absolutely necessary)-

wgcinc.com/620

Financial Documents are Not in Good Order

At times, the financial documents that are supplied to us cannot be translated into an **accurate business tax return**. What the heck does this mean? Good question... if we believe the information is not in good order we will need to have a discussion. We are very sensitive to every business owner's ability to perform accounting functions so we try to be gentle and put ourselves in your shoes.

We also understand from nearly two decades of working with business owners that they want to do the right thing; however for lack of a better way, business owners will do it their way. As such we can offer some guidance. There several paths we can take after our conversation-

- ▲ You add clarity to the information by chatting with us, and we carry on with a nice tax return for your review.
- ▲ You synthesize your financial information and documentation into a spreadsheet template that we've created-

wgcinc.com/21 (excel)

- ▲ You synthesize your financial information and documentation into a secure digital form-

wcginc.com/621

- ▲ We forward your financial information to our Accounting Services team who will re-work the data into useable financial statements. This option is one that we do not take lightly since it costs additional money above tax preparation. If this option is entertained, the usual retainer is about \$1,200 and the accounting services is billed at \$150 per hour. This is the high-water mark for most situations.

This option requires extending the tax returns until August or September.

- ▲ The last option is extending the tax returns until August or September where we can re-assess what is needed without the pressures of deadlines and other tax season madness. Please remember that an extension is an extension to file tax returns, not an extension to pay. We can advise further if this option seems appealing to everyone.

We don't expect financial documents to be perfect. We work with a huge variety of formats, from bar napkins to audited financial statements. However, as mentioned before, there are times where the financial documents that are supplied to us cannot be translated into an accurate business tax return. We also fear that you might not be taking advantage of all the allowed deductions (**we want to minimize your tax exposure**). And... if financial documents are not in good order, it would not properly support the tax return in the event of an IRS audit or challenge.

Sorry to be all gloom and doom, but our goal is to truly be your advocate.

Timeline for S Corporations and Partnerships

Here are some important dates and considerations for us to help manage expectations-

▲ Monday, February 12, 2024

All tax documentation must be received for us to guarantee an on-time filing (we routinely receive business documentation well into March and still complete the tax returns on time- we just can't promise it).

▲ Friday, March 8, 2024

All eFile or Extension authorizations must be received.

▲ Friday, March 15, 2024

The filing deadline for Partnerships (Form 1065) and S Corporations (Form 1120S). Note that C Corporations (Form 1120) are April 15, 2024. **Tax payments might also be due in some situations.**

▲ Our turnaround times vary throughout the year. We will update you with email and text alerts along the way. For real-time information on our turnaround times please visit this link-

wcginc.com/sla

▲ We have a soft-close at 4:05PM on Fridays to enjoy a beer, chips and salsa, and to unwind a bit. Apparently having fun before 4:00 is frowned upon in our establishment. Back at it on Saturday!

You might need a tax return "rushed" for various reasons. If we do not have substantially all the required information to prepare a tax return by our document cutoff date of **Monday, February 12**, the following minimum rush fees based on complexity may apply-

- After Monday, February 12, \$500.
- After Monday, February 19, \$1,000.
- After Monday, February 26, Not available.

These fees might be waived or increased depending on your situation. Please note- we are not saying you must pay this rush fee if you miss a cutoff; we only charge it if you want a guaranteed timely filing once we are past the **Monday, February 12 cutoff**. Having said all this, nothing good happens when people are rushed at the last minute. We will accept the rush arrangement on a case by case basis.

February 2024 						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

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March 2024 						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

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Timeline for C Corporations

Here are some important dates and considerations for us to help manage expectations-

▲ Monday, March 11, 2024

All tax documentation must be received for us to guarantee an on-time filing (we routinely receive business documentation well into April and still complete the tax returns on time- we just can't promise it).

▲ Monday, April 8, 2024

All eFile or Extension authorizations must be received.

▲ Monday, April 15, 2024

The filing deadline for C Corporations (Form 1120). Note that Partnerships (Form 1065) and S Corporations (Form 1120S) are March 15, 2024. **Tax payments might also be due in some situations.**

▲ Our turnaround times vary throughout the year. We will update you with email and text alerts along the way. For real-time information on our turnaround times please visit this link-

wcginc.com/sla

▲ We have a soft-close at 4:05PM on Fridays to enjoy a beer, chips and salsa, and to unwind a bit. Apparently having fun before 4:00 is frowned upon in our establishment. Back at it on Saturday!

You might need a tax return "rushed" for various reasons. If we do not have substantially all the required information to prepare a tax return by our document cutoff date of **Monday, March 11**, the following minimum rush fees based on complexity may apply-

- After Monday, March 11, \$500.
- After Monday, March 18, \$1,000.
- After Monday, March 25, Not available.

These fees might be waived or increased depending on your situation. Please note- we are not saying you must pay this rush fee if you miss a cutoff; we only charge it if you want a guaranteed timely filing once we are past the **Monday, March 11 cutoff**. Having said all this, nothing good happens when people are rushed at the last minute. We will accept the rush arrangement on a case-by-case basis.

March 2024 						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

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April 2024 						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

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Business Entity Tax Preparation Considerations

Extensions

If you want to extend your tax returns, a few things to keep in mind. First, we must get written approval from you to extend your tax returns. We cannot legally file an extension without permission. So, if we don't hear from you an extension will not be filed. Failure to file is a huge penalty (5% per month based on tax due).

Second, an extension to file is NOT an extension to pay. A pass-thru entity such as partnership or S corporation generally does not have a federal tax obligation. However, some states charge a franchise tax or a "pleasure to do business in our state" tax. If this applies, **taxes might be due March 15, 2024**. Yuck!

Here is quick list of states that have some sort of business entity tax-

California (shocker)	Louisiana	New York	Tennessee (not kidding)
Georgia	Massachusetts	North Carolina	Texas (limits)
Idaho	Mississippi	Oregon	Vermont
Illinois	New Jersey	Rhode Island	Washington (B&O Tax)
Kentucky	New Mexico	South Carolina	

Here is the link to extend your tax returns-

wcginc.com/extend

We must receive your tax return extension authorization by Friday, March 8 for Partnerships and S Corps, and Monday, April 18 for C Corporations. Also, please don't believe your produce clerk or the guy you met on the train; while they mean well, tax return extensions do not increase your audit rate risk. That is just gibberish.

Critical Note: To meet the filing requirements for individual tax returns, extended business entity tax returns will be completed in August or September provided we have everything we need from you. If you need them prepared sooner, please contact us. May, June and July are reserved for 2023 tax planning.

As such your individual tax returns will also need to be extended. Our turnaround time increases to **12-15 days** during the off-season to accommodate for mental breaks and vacations. Frankly, our motivation wanes slightly after April 15 but we bounce back fast.

Here is the timeline for extended tax returns-

	Individuals / C Corps	Partnerships / S Corps
	1040 / 1120	1065 / 1120S
Tax Documents Due	Tue, September 3	Mon, August 5
eFile and Fee Payments Due	Tue, October 8	Mon, September 9
Filing Deadline	Tue, October 15	Mon, September 16

Please note the **Monday, August 5** deadline for tax documents and financial data. This date can creep up on everyone quickly given summer distractions.

Client Engagement Agreement

The IRS, American Institute of Certified Public Accountants (AICPA), ethical guidelines and our professional liability insurance require client engagement agreements. They can be demanding that way. Please click on the link below to electronically review and sign this agreement.

wcginc.com/engagement

It is easy and painless, and needs to be submitted prior to the preparation of your tax returns. Yes, we need one for every year. Yes, we need one even if you are a Business Advisory Services client.

College Interns

WCG gives back to our accounting community by routinely hiring college students to provide seasonal tax support to our Tax Accountants and Tax Managers. We encourage them to communicate directly with you, the wonderful client, to gather necessary information and keep things moving along. Everyone was new at some point in their careers, so please try to extend extra grace and patience as our Tax Support Team interacts with you. If at any time communication is breaking down, please reach out to your Client Manager directly.

K-1s and States, Local or Other Taxing Jurisdictions

K-1s used to be only for the rich and shameless. However, with the rapid rise in various investments beyond mutual funds, ETFs, stocks and bonds, K-1s are becoming very common for the casual investor. typically allocate 30 minutes of "K-1 bucks" as part of your tax return preparation fee. Afterwards, our additional fee is based on an hourly rate of \$250. This is the only additional fee that WCG adds based on time spent. We are not an hourly rate time billing sort of firm... our fees are based on value received or impact created. Over the years we've seen K-1s and their complexity dramatically increase, but given the variable nature of each investment, a hybrid method of fee range + hourly rate is prudent.

Additional state, local or other taxing jurisdiction income tax returns might be required because of changing residency and / or various business activities including K-1s. It is common for an investment into an entity to create a state income tax return filing obligation for its owners (investors). We expect 1-2 state, local or other taxing jurisdiction tax returns as a normal course of tax return preparation. Should additional tax returns be required or if complex state income apportionment is required, additional tax return preparation fees will be necessary. Generally, this fee is \$100 to \$250 per state, local or other taxing jurisdiction income tax return.

Security and Privacy Procedures

Your security and privacy are very important to everyone at WCG. Please review the various policies and procedures which are implemented to protect your confidential information.

wcginc.com/safe

Tax Deductions and Fringe Benefits

As a small business owner, we want to help you leverage the most out of your business through proper business tax deductions and fringe benefits. Please review the online version of Chapter 11 of our book at-

wcginc.com/8132

And our various blog posts-

wcginc.com/blog

If you are a Business Advisory Services client, you are familiar with our Periodic Business Reviews (PBRs). Either way, please review our PBR agenda since it might trigger additional comments or concerns-

wcginc.com/pbr

Worksheets Available

Here is a list of our online digital worksheets. As mentioned before, you do not have to replicate data that is available elsewhere. For example, mortgage interest and real estate taxes reported on Form 1098 do not need to be entered again with our worksheets. Let's keep life simple and easy for you; that's why you hired us.

Business Set Up	Used for all businesses to detail set up information	wcginc.com/620
Business Ops, Fin. Data	Used for all businesses to report income and expenses	wcginc.com/621
Home Office	Used for home office deductions	wcginc.com/623
Auto Expenses	Used for actual expenses and mileage information	wcginc.com/625
Accountable Plan	Used for business owners to reimburse for mixed use expenses	wcginc.com/628

You can also access all this stuff with our Getting Started webpage link-

wcginc.com/taxes-biz

You will find our forms very short and concise, and in general they will help ensure that your tax returns are comprehensive. Our experience has shown that errors and misunderstandings come from scribbled notes and the like. While you are telling us about your favorite food, we hear green is your favorite color. So, everyone wins if we can efficiently and accurately process your tax information during the preparation of your tax returns.

Having said that, if you want us to tally or summarize notes and receipts into our forms, we must charge \$150 per hour for this preparation (a little bit here and there is always expected- but the bag of receipts, not so much).

Sending Us Your Documents

We provide worldwide tax preparation service and your ability to communicate with us is critical to everyone's success. And your comfort level in sending sensitive and personal information is our top priority so we have implemented three ways to safely and securely send your tax documents to us:

Sharefile

Since 2007 we have used ShareFile to provides secure, online document exchange. Sharefile will allow you to securely upload your tax documents to our office. As more companies electronically provide year-end tax statements and forms, and as scanners become more user friendly, uploading these files will save you time and resources. In addition, Sharefile will be used to deliver your tax returns for review prior to eFiling.

Note on Scanning: Do what you can, but know that creating and submitting a PDF for each tax document is our selfish preference should you be wondering. We drag each tax document into various folders in your electronic tax binder.

Most operating systems have a PDF printer already installed- if not, please do an internet search for free PDF printers (we use Cute PDF ourselves). This is a very handy tool which installs a **PDF printer** allowing you to print anything to a PDF file. Screen shots, online activity, Excel spreadsheets; anything you normally print to paper can

be saved as a PDF. This is especially useful for bank website or other dynamic websites where you cannot directly save the information.

We understand not everyone will be comfortable using Sharefile and therefore we will accommodate all reasonable requests for alternative ways of sending your tax documents to us.

Otherwise, you can access Sharefile at-

wcginc.com/sharefile

Secure Fax

If you decide to fax your tax documents our toll-free fax number is 855-345-9700. We will email you and send a text message alerting you that your fax was received. We will also upload your faxed documents to Sharefile should you need this information again in the future. Please provide a cover letter with all faxes. If you want to be a superstar and have our tax admins think you are the best client ever, you should initial and number each page. But that is not required.

Mail

If you do not have access to a fax machine or scanner, you may also mail your information to us. We encourage the use of FedEx or UPS. **Send us copies, please!** Our mailing address is:

WCG CPAs & Advisors

2393 Flying Horse Club Drive
Colorado Springs, CO 80921

Road Trip

Our Colorado Springs offices are open Tuesday-Thursday during tax season. If making a road trip to our office, tax preparation seems to improve dramatically with donuts. You can also hang out and have some coffee in our social lounge. Fun!

Note: The ability to maintain our competitive fees relies on receiving soft copies (faxes, scans, emails) or hard copies of your originals. If you send us original documents and do not want them returned to you we will maintain them in our office for three years. If you want originals sent back to you, we must charge a \$45 fee for the costs of copying and mailing. We do not have extra resources during tax season for this activity- **we can only return originals in May.**

All tax documents and work papers that you provide as hard copies will be scanned and uploaded to Sharefile.

Let Us Know

Lastly, you can use any combination of these methods- if you want to upload some documents and fax others, we are flexible. However, **it is difficult to know when clients are done sending their tax documents.** So, please send an email to **support@wcginc.com** or give us a shout at 719-387-9800 to let us know you are done. We love phone calls from our clients- voices, stories, weather updates- all good stuff!

Also, if you are waiting on one last tax document such as a rogue K-1 or 1099, please send what you have. We will prepare a preliminary tax return, and simply drop in the late document at the last minute.

Appointment

Over 80% of our tax clients live outside of Colorado, therefore we are proficient in preparing your tax return without a face-to-face appointment. However, if Colorado Springs or Englewood is convenient for you or if you would like to videoconference, please call or email us to schedule. If an appointment is inconvenient, remember you can always mail, fax or scan your tax documents to us.

Growing Pains

We are a growing company and every year we retool our procedures. The unfortunate thing about our business is that we don't know our process is broken or needs improvement until about March 26, and the devil we created is the devil we live with until April 15. Each year we attempt to improve our process for you- the feedback you provide is tremendous, and we appreciate all the comments and suggestions.

Rest assured that anytime you feel your needs are not being met, please contact Jason Watson directly. We will stop, listen and work with you one on one to resolve. If we stink at something, we want to know. We'll make it right, right away.

The Process

Here is a timeline of what to expect. Life is all about managing expectations, and we attempt to do that here-

Assembly

- ▲ You send us your tax stuff and we alert you through an email and a text message that it is received.
- ▲ Client Support reviews it for obvious missing information or items, and contacts you if necessary.
- ▲ Your file is assigned to a two-person team based on legacy for returning clients, or type and complexity for new clients. We also alert you with an email and a text message.

Tax Preparation

- ▲ Your Tax Accountant alongside a Tax Manager or Partner prepare your tax returns. Fun!
- ▲ If there are questions or clarifications needed, your Tax Accountant contacts you via email or telephone call. You are also alerted with a text message. We try to only have one point of contact (or one throat to choke) so communications are efficient for you.

Tax Return Review and Filing

- ▲ If your tax returns are ready for review, we send a summary email highlighting concerns or questions, upload a PDF copy to Sharefile and alert you with a text message. In the homestretch now!
- ▲ If you have questions or comments, you can reply to the tax return summary email or we can schedule an appointment. We always want you to understand your tax returns and feel comfortable about the information being filed. For a scheduled tax return review, we typically allocate about 15-20 minutes for individual tax returns (40 minutes if in-person versus telephone), and 30-40 minutes for partnership and corporate tax returns.

We do not have to review your tax returns directly with you. It is highly recommended since you are the most intimate with your business but it is not required.

Warning: We strongly encourage you to schedule your tax return review within 10 business days of receiving the draft copies. If you have had draft copies of your tax returns for more than 10 business days,

we might not have availability to review your tax returns prior to the filing deadline. Also, we cannot review your partnership and S corporation tax returns during March; same applies to C corporations and individual tax returns during April. Do not feel rushed! We can simply extend the filing of the tax returns until May or June, and schedule a review for that time.

Please move 'review tax returns' ahead of 'call mom' on your To-Do List just this one time. Pretty please.

▲ Once you review and approve your business entity tax returns, you need to do two things-

1. Give us permission to eFile your tax returns on your behalf, AND
2. Pay your tax preparation fee. No tax returns are filed until payment is made. Do both here-

wcginc.com/bizfile

▲ About 2-3 days after eFiling you will receive emails from our tax software (UltraTax) letting you know that your tax returns have been received. It is common for states to accept your tax returns before the IRS.

We get the same notifications CC'd to us and alert you with a text message. We monitor the acceptance of your tax returns, and follow up with the taxing agencies after 72 hours if an acceptance notification is not received.

▲ Boom! That's it (at least until next year). Enjoy your spring and summer!

Tax Patrol

We also have Tax Patrol! This is a wonderful tax service for those who don't need all the business advisory bells and whistles above, but from time to time want some love from an experienced tax consultant and business advisor. Have a quick tax question? Need to know the depreciation rules as you buy that new car? Wondering what your April tax bill is going to be in August? Tax Patrol is like ski patrol... you might not use it, but you sleep better knowing you have it.

Typical Tax Patrol fee is \$175 per month which includes business entity tax preparation, estimated tax payment calculations, unlimited complimentary quick chats and a tax planning event. Add your individual tax return for an extra \$90 per month.

In Closing

If you have any questions, please feel free to call us at 719-387-9800 or email at support@wgcinc.com. Thanks again for your time- We look forward to working with you!!

Warm Regards,

WCG CPAs & Advisors

2393 Flying Horse Club Drive, Colorado Springs, CO 80921

719-387-9800 office

719-345-2100 text

855-345-9700 fax

wcginc.com