

The SDA Way

Small business owners have unique needs. We are not like large accounting firms or the sole practitioner bookkeeper. We care about small businesses because we are one. The SDA Way is a proven road map to get you from where you are → to where you need to be.

1. Discovery

- Introductions
- Needs & Concerns
- Clarify Expectations – Yours & Ours
- Obtain Info Necessary to Prepare Proposal

2. Solutions

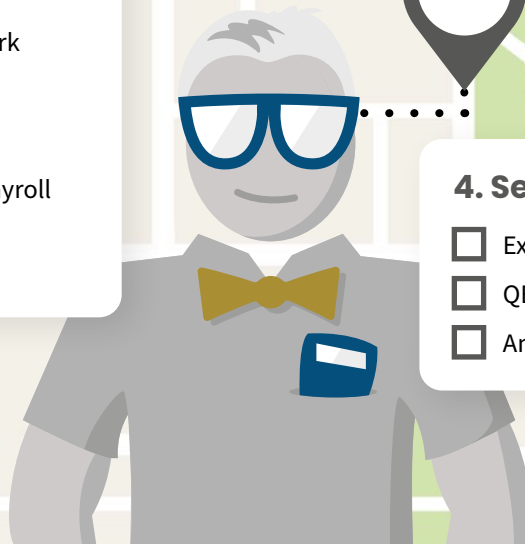
- Show How We Can Help
- Review Solutions/Proposal
- Obtain Client Signature
- Schedule Strategy Sessions

3. First Strategy Session

- Review New Client Paperwork
- Obtain Needed Tax IDs
- Setup Bank Logins
- Review Accounting, Tax & Payroll Information
- Answer Questions

4. Second Strategy Session

- Explain Your Financials
- QBO Demo
- Answer Questions



Ongoing Services

What To Expect From Working With Us



Accounting

All Packages

- ✓ Financial Statement Prep
- ✓ Calculate Depreciation
- ✓ Prepare Sales Taxes
- ✓ Quarterly Financial Review Meeting

Full Package

- ✓ Monthly Bank & CC Reconcile

Premium Package

- ✓ Weekly Bank & CC Reconciliation
- ✓ Bill Pay



Tax

All Packages

- ✓ 1099 Prep
- ✓ Owner's Comp Planning
- ✓ Income Tax Return Prep
- ✓ Property Tax Prep

Peace of Mind Package

- ✓ Quarterly Estimated Tax Reminders
- ✓ One Tax Projection

Tax Savers Package

- ✓ Quarterly Estimated Tax Reminders
- ✓ Two Tax Projections
- ✓ Tax Planning Report



Payroll

Every Payroll

- ✓ Paycheck Prep
- ✓ Direct Deposit of Paychecks
- ✓ Payroll Tax Deposits

Quarterly

- ✓ Payroll Form Prep – IRS, State DOR and DOL

Annual

- ✓ W2 Prep

For more detailed info about our Accounting, Tax and Payroll Packages, visit sdaCPA.com/services

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