

WHAT WE OFFER

# Services That Grow With You

Comprehensive financial solutions tailored to your practice — delivered with clarity, precision, and strategic intent.

## Monthly

### Financial Health Check-Ups

- ✓ **Gain clarity** on your financial health with timely financial reports
- ✓ **Uncover hidden opportunities** to increase profitability with in-depth financial analysis
- ✓ **Ensure steady cash flow** by assessing feasibility and planning ahead
- ✓ **Track Profits & Overhead Benchmarks** with our Fathom Financial Pulse Reports

## Q1 & Q2

### Stress-Free Tax Season

- ✓ **Enter tax season stress-free** with our streamlined document collection process and cutting edge technology
- ✓ **Ensure smooth operations** by streamlining account procedures
- ✓ **Fast communication and filings done** on time — when we handle your bookkeeping and receive documents on time, we promise timely filings by the deadline

## Q3

### Level-Up Your Practice Management Skills

- ✓ **Keep your finances in check** with a custom Mid-Year Practice Analysis Report
- ✓ **Reduce tax surprises** with strategic mid-year tax planning
- ✓ **Stay compliant & avoid last-minute stress** by preparing for personal property taxes
- ✓ **Gain expert knowledge** through planning meetings

## Q4

### Maximize Year-End Performance

- ✓ **Maximize savings before the year ends** with expert year-end tax planning
- ✓ **Protect your earnings** with customized tax strategies that align with your goals
- ✓ **Stay compliant and stress-free** with accurate sales tax return preparation (if required)
- ✓ **Minimize tax liabilities** with proactive tax planning tailored to your practice

and CDE programs to drive practice growth

#### IMPORTANT DATES (YEARLY)

 **MAR 15**

- ✓ Business Tax Deadline
- ✓ Partnership 1065
- ✓ S-Corporation 1120s

 **APR 15**

- ✓ Personal Tax Deadline
- ✓ C-Corporation
- ✓ Personal 1040

 **SEP 15**

- ✓ Final Tax Deadline
- ✓ Partnership 1065
- ✓ S-Corporation 1120s

 **OCT 15**

- ✓ Final Personal Tax Deadline
- ✓ C-Corporation 1120
- ✓ Personal 1040

ONGOING

### Real-Time Financial Insights & Budgeting

- ✓ Gain access to a **dedicated support team** that is just a click away
- ✓ Get help **managing any financial challenges** and making informed decisions
- ✓ Enjoy **real-time access** to leading support
- ✓ Easily manage your budget with **subscription-style fixed-fee plans**