



AccountTech

Finance, Accounting and Data Entry

CORPORATE
BROCHURE

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WHO ARE WE?

AccountTech is your all-in-one small business solution for accounting, bookkeeping, payroll, bill pay, tax, and CFA services.

Welcome to AccountTech Solutions. We have been in business for over 15 years,

Our experience using best-of-breed technology enables us to provide bookkeeping and accounting services wherever you are.

AccountTech Solutions is not a technology company; we are real accountants partnering with your business to serve you in the best possible way.

- Online Bookkeeping
- Streamlined Bill Pay
- Full Service Payroll
- Financial Statement Preparation
- Tax Preparation and Advising
- Audit Assistance
- Budget Preparation
- Job Costing
- Financial Planning
- Financial Model preparation
- Medical Billing

And Much, Much More...



When you become an AccountTech client, you will have access to a dedicated team that will look after your business interests as if they were their own. Whether it is the Small Business Plan or Small Business Plus that you select, AccountTech can provide the financial tools and reports necessary to understand your financial position and make sound business decisions to grow your business.

Costs are modest and always agreed upon in advance. We are committed to the satisfaction of each client, which is why most of our new accounts are referrals from existing clients.

Give us a call today,
and let's start a conversation!

PRIVACY POLICY

AccountTech Solutions focuses on implementing fair information practices that are designed to protect your privacy.

You may have some concern about the confidentiality of the information you provide to this office. It is our policy to keep your personal and business matters confidential to the extent permitted by law.

Client Information, Privacy Policies and Notice Regarding Advisor-Client Privileged Communications



The Federal Trade Commission has issued regulations that require tax preparation firms to provide an annual statement of firm privacy policies. Here is our policy:

We handle all information you provide us with the utmost confidentiality. Your personal information will only be shared with members of our firm who need to know this information in order to complete the work you have hired our firm to do. We will not disclose your personal information to anyone outside our firm without your express written permission to do so, or unless we are legally required to do so. For example, if a mortgage lender contacts our office for a copy of your return or information about it, we will ask that you provide written permission prior to our responding to that request.

You should also be aware that anything you tell us during the interview for the preparation of your tax return is confidential but not protected from the IRS. Privileged communications (those protected from IRS authority to compel our testimony) are limited to non-criminal tax advice on matters before the IRS or non-criminal tax proceedings in federal courts. Although we consider any information you provide confidential, return preparation engagements are not covered by advisor-client privilege.

If you feel the nature of any subject matter to be protected communications, please raise the issue at the time of discussion to understand your need for legal advice.

BOOKKEEPING

Convenience in a modern world

With us, it's personal

Our dedicated team of bookkeepers and accountants provides high-quality, meticulous bookkeeping services for far less than the cost of hiring an in-house professional.

Accrual or cash

We will guide you through the best accounting method for your business and keep your books accordingly

Tax planning and preparation

Our team of CPAs and EAs prepare, review and file your tax returns to keep you compliant and help you save the most money.

Running your business is a full-time job, bookkeeping is ours.

Better books. Better decisions. Bigger profits. We keep your books clean and accurate.

Bill pay and invoicing

Our flexible, streamlined, and intelligent bill pay system gives back hours of your time and seamlessly manages your cash flow.

Reporting and advice

We work with you to enhance your understanding of your financial position and use key performance indicators so you have usable insights to guide your decisions.



PAYROLL

Managing payroll may not seem like a critical task until something goes wrong. It can be time-consuming, but, more importantly, it requires a good Knowledge of the tax laws and deposit rules.

As a small business, it can be challenging to keep up with all the required tasks. In addition to paychecks, a professional payroll service can help generate the required payroll forms, file your payroll tax returns, and more to help you keep your business running smoothly.

Comprehensive Payroll Solutions

At AccountTech Solutions, our payroll services are designed to provide a comprehensive solution for managing your payroll duties. With our services, you only need to provide your employee data, such as the hours worked, employee address information, and other related details. Once we receive the data, we will handle the rest.

Using a payroll service might not seem necessary for managing your payroll until there is a problem. Correcting issues with payroll can be time-consuming and requires a thorough understanding of the tax laws and deposit rules. A professional service like AccountTech Solutions can take the headache out of doing your payroll. We will monitor all applicable federal, state, and local laws that may affect your tax filings. We will stay on top of these updates so you never have to worry about being left behind.

Security and Compliance

When you work with us, you will have the assurance of knowing that your data is secure. We adhere to the data security regulations as required by federal compliance agencies. These regulations ensure that your data is securely maintained and transmitted to the appropriate tax agencies.

Here are the payroll services that we offer:

- Checks or Direct Deposit for Your Employees
- Federal Tax Liabilities
- State & Local Tax Liabilities
- Unemployment Tax Liabilities
- Quarterly Tax Forms
- Year-End Tax Forms
- Customized Payroll Reports
- Tax Deposit Services
- W-2s and 1099s

Whether you are just starting your business or looking to switch to a better system for payroll processing, we can provide the business services you require. We can help simplify the payroll process to help you manage your small business effectively.

Let us assist you with your payroll needs so that you can focus on running your business.

BILL PAY

We manage your bills so you can take back your business

Less hassle = more time to run your business

Leave the tedious process to us - like entering, categorizing, and paying bills - and leave the approvals to you, which you can do on any device.

Smarter business decisions

We do the work, you get the benefits: enhanced cash flow management, more time to run your business, financial control and risk reduction.

A safer way to pay

We use the highest level of bank security to reduce the risk for a secure way to outsource your bill pay.

TAX

Preparing and planning for taxes is often a stressful and complicated endeavor for most people.

Preparing your own tax return can be extremely difficult with today's complex tax code and may often leave you with more questions than answers.

These days, the majority of people and small businesses use a professional tax consultants to assist with the preparation of taxes. Even if you are just filing a simple return, the rules may change from year to year and it is easy to overlook these changes and submit an incorrect return. By doing your taxes yourself, you may also end up overlooking deductions and credits.

At AccountTech Solutions, we have the expertise that is needed to help you file your returns and minimize your tax liability with careful planning.

Our tax preparation services include:

- Individual Tax Preparation
- Business Tax Return Preparation
- Gift & Estate Tax Return Preparation
- Partnership & Corporate Tax Preparation
- Estate and Succession Planning
- Out-of-State Returns
- Business Start-Ups

AccountTech Solutions can also help with our extensive tax planning services

Tax Planning & Education

Tax planning is essential to help you successfully and legally reduce the amount of your tax liabilities. In addition to making sure that your business is tax compliant, we also can suggest tax saving strategies that will maximize your after-tax income.

We offer tax education and planning to assist start-ups, as well as, established businesses. We will provide you with a complete list of the most commonly overlooked deductions so that you can limit your tax liability for the year.

We will also assist you with tax planning by:

- Helping you to defer income so that you can save money now and pay less taxes in the future
- Lower taxes on your income so that you can keep more of your earnings
- Lower taxes on your estate and gifts so that the beneficiaries can keep more of what you have given
- Lower taxes on investments and retirement distributions so that you can maintain your lifestyle and much more.

If you own a small business or need help with individual taxes, working with a professional tax planning service can help save you more money. AccountTech Solutions offers the expertise that you need to save on your taxes at affordable prices.

PACKAGES

Accounting and Bookkeeping packages

	Starter Billed monthly	Essential Billed monthly	Essential Plus Billed monthly	Professional
Client size	100 monthly Transactions	200 monthly Transactions	300 monthly Transactions	Custom
Service Level	Monthly	Semi-monthly	Daily	Daily
Onboarding	1 week	1 week	1 week	2 weeks
Dedicated Bookkeeper and Account Manager	✓	✓	✓	✓
Month End Close with Bank/Credit Card Reconciliation	✓	✓	✓	✓
Balance Sheet, Profit & Loss, Statement of Cash Flows	✓	✓	✓	✓
Cash or Accrual	✓	✓	✓	✓
Secure Portal with Document Storage	✓	✓	✓	✓
Online Support	Limited	Unlimited	Unlimited	Unlimited
Bill Pay	10 monthly invoices	20 monthly invoices	40 monthly invoices	✓
Monthly Scheduled Meetings	✓	✓	✓	✓
Lite CFO and Advisory Services	✓	✓	✓	✓
Separation of transactions by Class/Location/Department	✓	✓	✓	✓

Payroll Packages

	Core Billed monthly	Premium Billed monthly	Elite
No. of Employee	1 - 10	11 - 20	Any
Full-service payroll (Includes taxes and forms)	✓	✓	✓
1099 E-File & Pay	✓	✓	✓
Dedicated Payroll Assistant	✓	✓	✓
Same-day direct deposit Facility	-	✓	✓
Expert review	-	✓	✓