

Business Services

You didn't become a business owner to do paperwork and manage spreadsheets. We're here to help you save time and money by managing the minutiae – so you can focus on growing your business. With seamless integrations, Guidant clients save extra time and energy by having all their data in one place. Talk to our Client Success Team to learn more about discounts for service bundles.



Guidant Accounting and Tax

We designed our Accounting and Tax solutions specifically for small businesses. You simply choose what you need to minimize your administrative effort and maximize your cash flow.

Accounting & Tax Support

Best for owners wanting to manage their own books. We'll help with initial setup and answer on-going questions.

- ✓ Initial Accounting Setup
- ✓ Annual Corporate Tax Return
- ✓ Unlimited Accounting Software Questions
- ✓ Unlimited Accountant Questions
- ✓ Unlimited CPA/Tax Questions
- ✓ Annual Tax Strategy Planning Session
- ✓ Quarterly Review Book for Accuracy
- ✓ Monthly Financial Reporting & Industry Benchmarking

Bookkeeping Only

Best for owners who have a trusted CPA. We'll take the burden of managing your books off your hands.

- ✓ Initial Accounting Setup
- ✓ Unlimited Accounting Software Questions
- ✓ Unlimited Accountant Questions
- ✓ Monthly Financial Reporting & Industry Benchmarking
- ✓ Monthly Bank Reconciliation
- ✓ Expense Categorization & Automation
- ✓ Payroll Import & Reconciliation
- ✓ Monthly Journal Entries
- ✓ Monthly Depreciation & Amortization
- ✓ Monthly AR/AP Review
- ✓ Monthly Revenue Review

Premium Accounting & Tax

Best for owners who don't have a CPA. Our experts will handle your accounting, taxes, and your books.

- ✓ Initial Accounting Setup
- ✓ Annual Corporate Tax Return
- ✓ Unlimited Accounting Software Questions
- ✓ Unlimited Accountant Questions
- ✓ Unlimited CPA/Tax Questions
- ✓ Annual Tax Strategy Planning Session
- ✓ Quarterly Review Book for Accuracy
- ✓ Monthly Financial Reporting & Industry Benchmarking
- ✓ Monthly Bank Reconciliation
- ✓ Expense Categorization & Automation
- ✓ Payroll Import & Reconciliation
- ✓ Monthly Journal Entries
- ✓ Monthly Depreciation & Amortization
- ✓ Monthly AR/AP Review
- ✓ Monthly Revenue Review



Initial Account Setup

Best for new businesses that need support setting up their books but plan on self-managing. We'll even credit the cost to your subscription if you sign up for a plan within 6 months of setup.

- ✓ Chart of Accounts Creation
- ✓ Product/Revenue Setup
- ✓ Sales Tax Item Setup
- ✓ Merchant Services Sync
- ✓ Bank Feed Setup
- ✓ Reporting Package Setup
- ✓ Software Package Selection
- ✓ Invoicing/Revenue Tracking Training
- ✓ Payroll Import File Setup (Guidant Only)



Guidant Payroll

Set and forget your payroll needs. With our robust features, you can run your payroll in under 20 minutes.

Core Payroll

Best for businesses with less than 5 employees.

- ✓ Full-service payroll
- ✓ Employee self-service
- ✓ Tax penalty protection
- ✓ Timesheet uploads
- ✓ Digital employee onboarding
- ✓ Built-in digital employee onboarding
- ✓ Automatic payroll
- ✓ Expert service support
- ✓ General ledger reports
- ✓ Managed garnishments & deductions
- ✓ New hire state-specific reporting
- ✓ Remote payroll access
- ✓ Built-in direct deposit & paycards
- ✓ Guidant 401(k) plan admin connected

Premium Payroll

Best for businesses with 10+ employees.

- ✓ **All Core Payroll Features**
- ✓ Personal payroll specialist
- ✓ Health benefits administration
- ✓ Worker's comp administration
- ✓ Multiple admin users
- ✓ Customized security access
- ✓ Customized employee onboarding materials (i.e., employee handbooks)
- ✓ Labor distribution reporting
- ✓ Managed third-party payments
- ✓ Digital ACA 1095 form



Business Valuation Solutions

We're here with the right valuation tools for any of your needs.

Business Valuations

Best for supporting handshake agreements or making sure you get the right insurance coverage.

- ✓ Estimated Business Valuation
- ✓ Financing assessment
- ✓ Dedicated valuation specialist
- ✓ In-depth industry report

Certified Business Appraisals

Best for when you want to recapitalize your business, get an SBA loan, perform a stock buy-back, or have a taxable event.

- ✓ Certified Business Appraisal
- ✓ In-depth industry report
- ✓ Financing assessment
- ✓ Dedicated CVA specialist

Seller Suite

If it's time to sell your business, we have the tools you need in our Seller Suite.

- ✓ Estimated Business Valuation
- ✓ Financing assessment
- ✓ Marketing material
- ✓ Dedicated valuation specialist
- ✓ Business summary webpage
- ✓ Business Valuation for buyers
- ✓ Asking price assessment
- ✓ Buyer funding qualification



401(k) Plan Administration

As part of the process to use your retirement funds to launch your business with Rollovers for Business Start-ups (ROBS), we'll help you set up a new 401(k) plan for your new business. Our 401(k) plan administration services keep your plan safe, secure, and compliant.

- ✓ Preparation of IRS Form 5500: Report of Employee Benefit Plan
- ✓ Annual DOL and IRS compliance testing and review of your business's 401(k) plan
- ✓ Preparation of 401(k) plan Summary Annual Report (SAR), detailing plan activity and compliance recommendations and requirements
- ✓ Statement of Value (SOV) and comprehensive industry report
- ✓ 401(k) plan testing including elective deferrals test, annual additions test, actual deferral percentage (ADP) test, actual contribution percentage (ACP) test, minimum coverage test, and top-heavy testing
- ✓ Calculation of excess distributions required to correct any testing failures
- ✓ Annual time with an independent ERISA tax attorney
- ✓ Unlimited access to our team of retirement plan experts



Guidant HR

Everything you need to reduce administrative effort and maintain HR compliance, with options to best fit your business needs.

HR Support Center

Best for self-service HR support. No more endless searching for HR answers. Build an HR foundation quickly and easily with self-services libraries, tools, and templates.

- ✓ Policy library & law alerts
- ✓ HR forms, documents, and templates
- ✓ Employee handbook builder
- ✓ Resources covering common employer laws including ACA, FLSA, and FMLA
- ✓ Extensive COVID-19 content
- ✓ HR webinars lead by our HR Pros
- ✓ Monthly HR newsletter and eAlerts
- ✓ Guides on popular HR topics
- ✓ HR fitness test to assess HR compliance gaps

HR On-Demand

Best for concierge HR support. Solve HR Issues with unlimited, on-demand support from the industry's best team of certified HR professionals.

- ✓ Policy library & law alerts
- ✓ HR forms, documents, and templates
- ✓ Employee handbook builder
- ✓ Resources covering common employer laws including ACA, FLSA, and FMLA
- ✓ Extensive COVID-19 content
- ✓ HR webinars lead by our HR Pros
- ✓ Monthly HR newsletter and eAlerts
- ✓ Guides on popular HR topics
- ✓ HR fitness test to assess HR compliance gaps
- ✓ Unlimited live advice
- ✓ Questions and answer history
- ✓ HR concierge live chat
- ✓ Custom multi-state employee handbook with consultation
- ✓ Custom project requests
- ✓ Live COVID-19 support

