

# Guidant Accounting & Tax

You didn't become a business owner to do paperwork and manage spreadsheets. Guidant Financial is here to help you save time and money by managing the minutiae – so you can focus on growing your business.

We designed our Accounting & Tax offerings specifically for small business. No expensive packages filled with services you don't need, simply what you need to minimize your admin efforts and maximize cashflow.



## Save Time and Money

Spend time where it matters, not on paperwork. With automation experts on your team, we help eliminate duplication of work, allowing you to put your energy where it belongs.



## Proactive, Expert Support

Benefit from regular check-ins with a team that has seen it all before. Our team of QuickBooks, Tax and Accounting experts cover all major industries in all 50 states.



## Make Better Decisions

Our best-in-class financial reporting and industry benchmarking will give you insights into how and where you can improve your business performance. No more guessing!



## Effortless Combined Services

We can integrate with all major platforms - payroll, point-of-sales, bank account, credit card, etc. Guidant Payroll and 401(K) clients will have all year end data in one place.

We believe so strongly that you will feel and see a return on investment by working with us that if you're unhappy for any reason, we will refund up to 90 days of payments.



## Accounting & Tax Support that Helps Grow Your Business

*"I left my previous CPA because they were always slow to reply and felt like more of a liability than an asset...pun intended. My first check in with Guidant paid for itself. They asked about upcoming purchases and kept me from buying new equipment when the industry standard is to lease."*



Patrick B.  
BDI, Inc  
Kirkland, WA

# Accounting & Tax Plan Options

## Accounting & Tax Support

Best for owners that want to manage their books but want support with initial setup, accounting and taxes.

**\$225/Mo** base price

- ✓ 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
- ✓ Quarterly 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

## Bookkeeping Only

Best for owners that already have a trusted CPA, but don't want to take on the bookkeeping themselves.

**\$325/Mo** base price

- ✓ 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

## Premium Accounting & Tax

Best for businesses who need a trusted CPA partner and don't want to take on managing their books.

**\$375/Mo** base price

- ✓ 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 of 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

## Not ready for full-service accounting, but still need help with set up?

For those who want support getting their books setup, but plan on self-managing, \$480 one-time fee

*The \$480 will be credited back if you sign up for a package 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