

Hosted by **SCORE**  | Bucks County

Choosing Accounting Services for Your Small Business

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About SCORE

As a resource partner of the SBA, we help small businesses by:



Providing free
business advice
and mentoring



Offering low or
no-cost business
training



Sharing free business
templates and
resources

Request a SCORE mentor at www.score.org/find-mentor

Your Presenter



- Attended University of Pittsburgh (2008–2012)
 - Bachelor's Degree in Accounting
 - Certificate Program in Leadership & Ethics
- Work history...
 - PwC → EisnerAmper → SLK → SAMCO
- Obtained CPA license in 2015
- Work experience...
 - Tax compliance
 - Tax projections and planning
 - Financial statement preparation and analysis
 - Payroll
 - Bookkeeping

How is my Accountant?

- Communication, communication, and communication!
 - Availability
 - Responsiveness
 - Clarity
- Proactive
 - Who reaches out?
 - How often do you hear from them?
- Reliable, accountable, and ethical
- Knowledgeable, creative problem-solving
- Detail-oriented, organized

Services Offered

- Business formations
 - Single/multi-member LLCs, LLPs, Corporations
 - Sole proprietor, partnerships, S Corporation, C Corporations
- Tax compliance
 - Forms 1040, 1065, 1120-S, 1120
 - Schedule C and E
 - Estimated taxes
 - Additional local filings, if applicable
- Tax projections and planning
- Tax audit representation
 - IRS, state, and local

Services Offered

- Payroll tax deposits and filing
- W-2 and 1099 processing
- QuickBooks consulting
 - Desktop vs. Online
 - Versions available
- Bookkeeping and write-up accounting
 - Monthly, quarterly, semiannual reviews
 - Budgeting
 - Cash flows
 - KPI analysis (gross profit, working capital, debt-to-equity)
 - Costing
 - Break-even
- Financial statement preparation
 - Internally prepared
 - Compiled, reviewed, and audited

Future of Accounting

- Role of automation in accounting
- Expanding roles and services of the CPA
 - Consultants and advisors
 - “Controller” or “CFO”

Questions?

Helpful Links

- Find SCORE resources for small businesses at www.score.org/templates-resources
- Find more SCORE live and recorded workshops and courses at www.score.org/get-business-training
- Book an appointment with a SCORE mentor at www.score.org/find-mentor



**THANK YOU FOR YOUR
PARTICIPATION**



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