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Benefits And Services

“Making Optimal Choices”

www.robertbrennanaccountant.ca

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Overview

- I want to help you to succeed in your business
- I will first outline the benefits of using my accounting firm
- I will then outline the services that are offered
- Fees are briefly discussed
- Conclusion

Benefit: Experience

- | Over 25 years in accounting & taxation
- | Companies up to a few million in revenues
- | Private and public accounting background
- | I have done and seen a lot and you can take advantage of it

Benefit: Efficiency

- I support most accounting systems
- My custom bookkeeping and year end software gets the job done quickly with no duplicate data entry
- I can log on to your computer to assist you
- We can communicate and transfer files privately
- Use my payroll to avoid software upgrades

Benefit: Optimal Choices

- | Use reporting tools and analysis unique to your business
- | Get balanced advice considering business, economics, finance, accounting and tax areas as a whole
- | Save time and money with the right tax elections and options

Annual Year End Benefits

- Streamlined bookkeeping, accounting and reporting with the least effort
- Discussion of financial statements with you when there are important issues
- Procedures to minimize potential CRA audit problems
- Checking for HST and payroll problems
- Adjustments for more useful statements

Annual Year End Benefits

(cont'd)

- Consideration of tax implications to minimize taxation between corporate and personal income tax levels each year
- Other recommendations that might arise as a result of the work done

Basic Services

- | Assist bookkeeper if necessary
- | Complete the company year end
- | Do the basic tax planning, corporate tax and HST returns
- | Complete your personal tax returns if desired
- | Interface with CRA as necessary

Other Services

- | Support your accounting department
- | Fully utilize your accounting software
- | Assistance for management decisions
- | Profitability analysis, recommendations
- | Tax consulting, planning, CRA audits
- | Financial data for business plans, etc.
- | Financial analysis for special projects

Limitations

- Professional services are not offered for businesses outside of Ontario

Fees for Services

- Completion of the year end, basic tax planning and corporate tax returns – examples: (actual could be higher or lower, depending)

Revenue	Fees
Under \$100,000	\$600
\$100,000 to \$200,000	\$850
\$200,000 to \$400,000	\$1,150
\$400,000 to \$1,000,000	\$1,350
>\$1,000,000	\$1,550 +

Fees for Services

(cont'd)

- If other professional specialists are utilized it is done with your prior approval, and estimates are provided where possible
- Services that would be performed by an internal accountant are billed at \$80/hr
- If bookkeeping is required it is done utilizing the fastest and most accurate technology available

Conclusion

- | We have looked at how my experience and knowledge can assist you in running your business and minimizing taxes along the way
- | I want to help you make your business successful

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