

Cash Flow & Tax Planning

Premium CPA-led services designed to identify cash-flow drivers, improve margins, support smarter tax decisions, and give business owners a clear next step.

[OPEN CLIENT PORTAL](#)

Includes

Free Cash Flow Analysis • Detailed Diagnostic • Tax Plan with a CPA •
Monthly Cash Flow Intelligence • Accounting Review



Step 1: Free Cash Flow Analysis

Entry offer for prospects: a 3-minute assessment that leads to a personalized Cash Flow Diagnostic Report.

Use this as the first conversation starter

Identify bottlenecks
Quantify driver severity
Improve margin & collections

No credit card required. The goal is to show where cash is leaking, then invite the prospect into a paid diagnostic or monthly review.

[START FREE ASSESSMENT](#)

FREE CASH FLOW ANALYSIS

CPA-Led Diagnostic Assessment

Discover the financial drivers affecting your business cash flow in under 3 minutes. Get your personalized Cash Flow Diagnostic Report — free, no credit card required.



IDENTIFY
CASH FLOW BOTTLENECKS



QUANTIFY
DRIVER SEVERITY



IMPROVE
MARGIN & COLLECTIONS



TAKES 3 MINUTES. NO CREDIT CARD REQUIRED.
GET YOUR CASH FLOW DIAGNOSTIC REPORT



CPA-LED
DIAGNOSTIC

SEE WHERE
CASH IS LEAKING



BEFORE AFTER

Identify the drivers.
Fix the leaks.



Scan to start
your free
assessment

Or visit:

[START FREE ASSESSMENT →](#)

Step 2: One-Time Analysis & Tax Services

For clients who need focused CPA guidance.

ONE-TIME ANALYSIS

Detailed Cash Flow Diagnostic Analysis™

A CPA reviews the client’s actual financial statements to identify the primary cash-flow driver and areas requiring investigation. Delivered asynchronously.

One-time investment

\$297

TAX STRATEGY

Tax Plan with a CPA

Proactive CPA-led planning designed to legally minimize tax liability, improve cash flow, and support better business decisions.

One-time session or ongoing advisory

\$799

COMPLIANCE

Business Tax Compliance

Business tax compliance for small businesses with revenue from approximately \$1M–\$20M.

Starting price

\$1,000

Recommended path: Free assessment → \$297 diagnostic → tax plan or monthly subscription.

[CLIENT PORTAL](#)

Tax Plan with a CPA

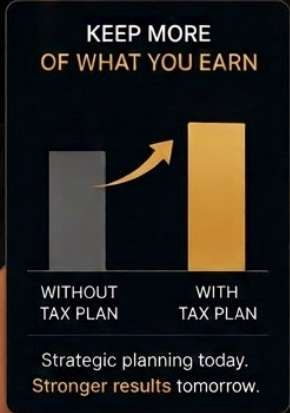


TAX PLAN WITH A CPA

Proactive tax planning.
Stronger cash flow. **Smarter** decisions.

A proactive CPA-led tax planning engagement designed to help you legally minimize your tax liability while improving cash flow and supporting better business decisions.

-  **IDENTIFY**
TAX-SAVING OPPORTUNITIES
-  **IMPLEMENT**
IRS-SUPPORTED TAX PLANNING STRATEGIES
-  **IMPROVE CASH FLOW**
& MAKE SMARTER DECISIONS



SCAN TO
GET STARTED
TODAY!

Or visit:

WCPA Digital

 **PLAN TODAY. SAVE TOMORROW.**
SCHEDULE YOUR TAX PLANNING SESSION

\$799
ONE-TIME INVESTMENT

GET ACCESS NOW →

Monthly Subscription

Ongoing CPA-led monitoring, scorecards, summaries, and review cadence.

ONE-TIME OR MONTHLY SUBSCRIPTION

Tax Plan with a CPA

A proactive CPA-led tax planning engagement designed to help you legally minimize your tax liability while improving cash flow and supporting better business decisions.

Tax Plan may be a one-time \$799 engagement or included in ongoing monthly advisory.

Core monthly review

\$799 / month

MONTHLY REVIEW

Bookkeeping / Accounting Review

CPA-level accounting review to align bookkeeping with reporting, tax compliance, and year-end preparation.

Monthly retainer

\$850 / month

Full Monthly Bundle

- ✓ Tax Plan with a CPA
- ✓ Accounting Review

\$1,649 / month

SUBSCRIBE IN PORTAL

Next Step

Start with the free assessment. Then choose the right CPA-led path.

For a focused issue, start with the Detailed Cash Flow Diagnostic Analysis™.
For ongoing visibility and accountability, subscribe to the Cash Flow Intelligence Review and related CPA advisory services.

Free assessment : <https://app.cpawolfe.com>

Client Portal - Detailed Cash Flow Diagnostic Analysis™

OPEN PORTAL

WCPA Digital