

ABOUT US

Trust Pointe Tax & Financial Advisory is a Texas-based, SBA- and SAMs-registered minority-owned virtual financial firm delivering valuable tax planning, IRS resolution, and outsourced financial operations nationwide. We help high-income earners and businesses stay compliant, tax-efficient, and financially secure.

- We offer strategic tax planning, tax preparation, and IRS debt resolution services.
- Our year-round tax and financial services help clients build long-term wealth and improve cash flow.
- We deliver accurate, cloud-based bookkeeping, payroll, and outsourced accounting solutions.
- We ensure compliance readiness through secure digital systems and audit-focused reporting.

CORE COMPETENCIES

- Strategic tax planning, preparation, and IRS representation (OIC, lien/levy removal, audit support)
- Full-cycle bookkeeping, payroll, and outsourced accounting
- Multi-entity and multi-state tax optimization
- White-labeled FOaaS partnerships for B2B and advisory firms
- Secure digital operations with e-signature and cloud-based file exchange
- Federal, state, and local tax compliance across jurisdictions
- Compliance training, onboarding kits, and client enablement webinars

PAST PERFORMANCE

East Dallas Community Organization

Period of Performance: May 2022 - Present

Contract Value: \$40,000

Point of Contact: Gerald Carlton

- Reconstructed multiple years of financials during an active acquisition inquiry, restoring grant eligibility and compliance.
- Full-cycle financial management for senior housing programs; ensured regulatory compliance and budgeting accuracy.

PROJECT MANAGEMENT CAPACITY

We manage multiple client projects simultaneously using structured workflows, clear timelines, and secure cloud-based tools. Our team tracks tasks, deadlines, and deliverables to ensure accuracy and timeliness. We support federal and commercial contracts, coordinate with subcontractors, and scale quickly to meet project demands.

PARTNERSHIP/CLIENTS

- East Dallas Community Organization
- Jubilee Park and Community Center
- Builders of Hope CDC
- Sight of Sound Productions
- County Roads Rescue
- Professional Touch Security
- Mill City Community Association
- High-Income Earners, Real Estate Investors & Property Managers (nationwide)
- B2B Accounting & Advisory Firms (white-labeled FOaaS partnerships)

DIFFERENTIATORS

- Qualified small business delivering best-in-industry solutions.
- Certified SBA-registered and Texas-based small business
- White-labeled financial operations for scalable B2B delivery
- IRS resolution and compliance expertise under urgent timelines
- Nationwide reach with licensed professionals across domains
- FOaaS and fractional CFO services tailored for federal contracting
- Proven internal controls and QA protocols ensuring accuracy, compliance, and transparency in all service engagements
- Errors & Omissions (E&O) insurance coverage to protect client interests and ensure risk mitigation

Delivering audit-ready, cybersecure financial operations tailored for federal, state, local, and commercial compliance and mission support.

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Coverage: Nationwide Virtual Services

COMPANY SNAPSHOT

Business Name: Trust Pointe Financial Services Inc

Business Phone: +1 888-316-8667

Corporation Type: Corporation

Year Founded: 2021

DUNS Number: 06-790-3979

CAGE Code: 11UE5

Socio-Economic Status: MBE, SBE, HUBZone

Unique Entity Identifier (UEI): NSQ6NBDS4FB3

TIN: 82-4281899

Coverage: Nationwide virtual services

NAICS CODES

541219: All Other Accounting Services (**PRIMARY**)

Add'l: 541213, 541990, 541690, 541618, 541612, 541611, 541519, 541214, 541211, 541120

PCS Codes:

R703, R704, R702, R799, R710, R705, R699, R708, R707

CERTIFICATIONS



TESTIMONIALS

“This company was able to pull off a recent job we needed done. Very thankful for the great work that was performed.

She is very professional and understanding, pleasant to work with. I would highly recommend their service for your accounting needs.”

ALENDRA L. - NONPROFIT FOUNDER OF MILL CITY COMMUNITY ASSOC

