



TrustPointe

Tax and Financial Advisory

CAPABILITY STATEMENT

ABOUT US

TPTFA delivers specialized expertise and tailored tax and financial solutions, with core competencies that ensure compliance, reduce tax burdens, and empower long-term growth.

- TPTFA specializes in strategic tax services and financial guidance for businesses and individuals.
- TPTFA has the capacity to handle small and medium (30+ personnel) contracts.
- TPTFA has the capability to serve in all 50 states.

CORE COMPETENCIES

TPTFA provides proven tax, bookkeeping, and financial solutions that protect wealth and support growth. Our services include:

- Proactive strategies and accurate filings to reduce liabilities.
- Organized financial records that deliver clarity and smarter decisions.
- Specialized strategies for REPS, non-REPS, and complex jurisdictions.
- Tailored guidance to build, protect, and grow wealth.
- White-labeled back-office support/partnership for B2B.
- Secure, accessible, and personalized service across all 50 states.

PAST PERFORMANCE

- Reduced tax liability for small businesses by 20–30% annually.
- Streamlined accounting systems for growing businesses, improving financial reporting accuracy and decision-making.
- Delivered secured virtual tax and advisory services to clients across the states.

PARTNERSHIP/CLIENTS

- East Dallas Community Organization
- Builders of Hope CDC
- Veterans of Foreign Wars Post 8913
- County Roads Rescue Animal Shelter
- Sight of Sound Productions
- RahGor Foundations
- and more...

DIFFERENTIATORS

At TPTFA we go beyond tax filing with proactive strategies, IRS account monitoring, and specialized expertise in real estate and multi-state taxation. Our nationwide virtual service model delivers secure, tailored solutions that reduce liabilities, protect wealth, and drive long-term financial success.

- We don't just file returns; we implement year-round planning to minimize liabilities and maximize wealth.
- Deep knowledge of property tax law, multi-state filings, and investor-focused strategies.
- Continuous oversight to detect red flags, prevent penalties, and reduce audit risks.
- Customized solutions for small businesses, nonprofits, and high-income earners facing complex tax issues.
- Secure, cloud-based systems provide seamless client support across all 50 states.
- Recognized for accuracy, compliance, and personalized client care with measurable results.

COMPANY SNAPSHOT

Business Name: Trust Pointe Financial Services Inc

dba: Trust Pointe Tax and Financial Advisory

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, DBE

Unique Entity Identifier (UEI): NSQ6NBDS4FB3

TIN: 82-4281899

NAICS CODES

541213: Tax Preparation Services

541219: All Other Accounting Services

541990: All Other Professional, Scientific, and Tech

541618: Other Management Consulting Services

541611: Admin Management and Gen Management

541120: Office of Notaries

541211: Offices of Certified Public Accountants

541214: Payroll Services

CERTIFICATIONS



Trust Pointe Tax and Financial Advisory — Helping You Keep More, Grow Smarter, and Stay Compliant.

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