



TrustPointe

Tax and Financial Advisory

CAPABILITY STATEMENT

ABOUT US

We provide expert tax strategy, compliance, and financial operations support for real estate professionals, small businesses, and nonprofit organizations. Our services are designed to reduce liability, maximize deductions, and ensure audit-readiness through proactive planning and automation.

CORE COMPETENCIES

- Tax Planning & Preparation: Multi-state filings, 1031 exchanges, depreciation stacking, entity-specific reporting
- IRS Representation & Tax Resolution: Audit defense, correspondence handling, 24/7 IRS account monitoring
- Bookkeeping & Accounting: GAAP-aligned reconciliations, CapEx vs OpEx tracking, property-level reporting
- Payroll & HR Support: Wage reporting, compliance, employee documentation
- Business Formation & Compliance: LLC/S-Corp setup, registrations, annual filings
- Government Contracting Support: Federal, state, and local compliance advisory

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

- Veterans of Foreign Wars Post 8913
- County Roads Rescue Animal Shelter
- Sight of Sound Productions

DIFFERENTIATORS

- Real estate specialization with proven deduction strategies
- Neurodivergent-friendly workflows and modular automation
- White-label tax support for agencies and partners
- Secure client portal with encrypted file exchange
- Forensic troubleshooting and fractional CFO insights

COMPANY SNAPSHOT

CEO: LaToya Price

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

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

CERTIFICATIONS



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

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