



## 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



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

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