

WASHINGTON FINANCIAL SERVICES, LLC

TAXES • BOOKKEEPING • FINANCIAL COACHING • REPRESENTATION

Clarity. Compliance. Confidence.

We handle the numbers so you can focus on your success.



JAMES WASHINGTON, EA

ENROLLED AGENT | TAX EXPERT | BUSINESS ADVISOR



Personalized
Service



Tax Compliance
& Protection



Accurate Books
Better Decisions



Financial Health
& Growth



Year-Round
Support

1. BOOKKEEPING SERVICES

Keep your books accurate, organized,
and tax-ready.

STARTER BOOKKEEPING

\$200/mo

Up to 100 transactions/month

- ✓ Transaction categorization
- ✓ Reconciliation of 1 bank account
- ✓ Monthly Profit & Loss report
- ✓ Email support

Best for: Freelancers, Etsy sellers,
& very small businesses

GROWTH BOOKKEEPING

\$350/mo

Up to 200 transactions/month

- ✓ Transaction categorization
- ✓ Reconciliation of up to 2 bank accounts
- ✓ Reconciliation of up to 2 credit cards
- ✓ Monthly P&L & Balance Sheet reports
- ✓ Email support

Best for: Small businesses, contractors,
& growing businesses

BUSINESS BOOKKEEPING PLUS

\$550/mo

Up to 350 transactions/month

- ✓ Transaction categorization
- ✓ Reconciliation of up to 3 bank accounts
- ✓ Reconciliation of up to 3 credit cards
- ✓ Monthly P&L, Balance Sheet,
& Cash Flow reports
- ✓ Quarterly financial review
- ✓ Books maintained in QuickBooks Online
- ✓ Priority email support

Best for: Established businesses with
higher transaction volume

BOOKKEEPING CLEANUP

1-3 Months	\$350 – \$600
4-6 Months	\$600 – \$1,200
7-12 Months	\$1,200 – \$2,500+

Pricing based on the volume and condition of records.
Custom quotes available.

ADD-ON SERVICES

Payroll Referral & Support	\$100 setup
1099 Preparation (Per Form)	\$15
Data Entry (Hourly)	\$65/hr
Additional Bank/Credit Card Account	\$25/mo per account
Budget Creation	\$150

2. TAX PREPARATION SERVICES

Accurate returns. Maximum deductions.
Peace of mind.

Individual Tax Return (1040)	\$250
Married Filing Joint	\$350
Head of Household	\$300
Additional State Return	\$75
Business Tax Return (Schedule C)	\$350
S-Corp / Partnership / Multi-Member LLC	\$550+ (Starts at)
New Business Setup (EIN & Tax Guidance)	\$175

SECOND LOOK REVIEW

(Prior 3 Years)

\$200/year

We review prior returns to find missed
deductions & credits.

4. FINANCIAL COACHING

Understand your numbers.
Build a stronger future.

Financial Snapshot & Health Score	\$150 (One-Time)
Ongoing Coaching (Monthly)	\$200
Includes:	
✓ Income, expense, asset, & debt review	
✓ Cash flow analysis	
✓ Action plan for financial goals	
✓ Quarterly check-ins	



NEW CLIENT OFFER

FREE

Financial Snapshot &
Health Score Session

First 3 potential clients who reach out
get a FREE 30-minute Zoom session.

3. TAX REPRESENTATION SERVICES

When the IRS comes knocking,
we step in for you.

IRS Notice Review & Response (Per Notice)	\$150
Payment Plan Setup	\$250
Currently Not Collectible (CNC)	\$350
Offer in Compromise (OIC) Assistance	\$750+ (Starts at)
Audit Representation	\$1,200+ (Starts at)
Wage Garnishment / Bank Levy Release	\$500+
Tax Tribunal Representation	\$1,500+

We communicate with the IRS
so you don't have to.

5. OTHER SERVICES

Business Entity Setup (LLC)	\$250
Tax Planning Package	\$350/quarter
Includes quarterly planning meeting, tax strategies, & estimates	
Sales Tax Filing (WA State)	\$50/month

WHY CLIENTS CHOOSE WFS

- ✓ Accurate, organized, and reliable
- ✓ Expert tax knowledge and representation
- ✓ Clear communication & personalized care
- ✓ Helping individuals & small businesses
grow with confidence



washingtonfinancialsvcs.com

Serving Individuals & Small Businesses
in Washington State and Beyond



Trusted. Reliable. Confidential.
Your financial success is our mission.

Prices are starting rates and may vary based on complexity. All fees are discussed upfront.