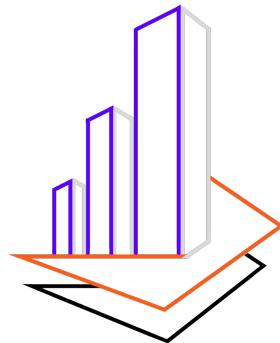


# Purewater Financial Success through Clarity.

**Tax Return Preparation, Planning, and Strategy Services  
Offering Pitch Deck**



# Contents of this Pitch Deck.

*(click on a selection to navigate to it)*

**Services We Offer**

**The Complexities of Tax  
Compliance**

**Solutions**

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# Services We Offer



## Virtual CFO Services

Our Virtual CFO services provide strategic financial guidance and oversight for your business.



## Tax Planning, Strategy, and Preparation

Comprehensive tax planning and compliance services for businesses and individuals.



## Accounting & Bookkeeping

Keep your finances organized with our professional accounting and bookkeeping services.



## Crypto Implementation and Consultancy Services

Navigate the complex world of cryptocurrency business implementation, accounting, and tax and compliance with our expert guidance.



## Business Development, Consultancy and Other Financial Services

Custom solutions for your specific financial and business development needs.

# The Complexities of Tax Compliance

## Multiple Income Sources

- W-2 income from employers
- Freelance/contract work requiring 1099 forms
- Investment income (interest, dividends, capital gains) needing separate schedules
- Side gig or “hobby” income that might need to be reported even if part-time

## Deductions, Credits, and Exemptions

- Standard vs. itemized deductions (Schedule A), with itemized deductions often being complex (mortgage interest, state/local taxes, medical expenses).
- Tax credits (e.g., Child Tax Credit, Earned Income Tax Credit, education credits) each with specific eligibility criteria and income thresholds.

## Varying Tax Rates and Brackets

- Federal tax brackets are graduated, meaning different portions of income are taxed at different rates.
- State and local taxes can add another layer of complexity, especially when individuals work in multiple states or have non-resident tax filing requirements.

## Self-Employment and Estimated Taxes

- Quarterly estimated tax payments if you don't have withholding (e.g., freelancers, independent contractors).
- Self-Employment Tax (Social Security and Medicare taxes) can be a surprise for new freelancers.
- Home office deductions and other specific rules, often complex to calculate accurately.

## Tax Recordkeeping

- Must track receipts, invoices, and other documentation for accurate itemized deductions and potential audits.
- Varies by type of income (e.g., 1099-NEC vs. 1099-DIV).

# The Complexities of Tax Compliance

## Entity Choice and Tax Treatment

- Sole Proprietorship vs. LLC vs. S Corporation vs. Partnership: each has unique filing rules and tax implications (e.g., pass-through taxation vs. corporate taxation).
- Selecting the right structure affects self-employment taxes, distribution of income, and available deductions.

## Payroll and Employment Taxes

- Withholding and remittance of federal (FICA, FUTA) and state payroll taxes can be intricate.
- Form 941 (Quarterly Federal Tax Return), Form 940 (Annual FUTA), and various state forms.
- Correct classification of workers (W-2 employees vs. 1099 contractors) to avoid penalties.

## Deductions, Credits, and Depreciation

- Business expenses: ordinary and necessary expenses, with special rules for meal & entertainment, travel, home office, etc.
- Depreciation and Section 179 deductions for equipment and property can be complicated, often requiring adherence to specific schedules.
- Various tax credits for small businesses (e.g., health insurance credits, R&D tax credits, energy incentives).

## Multi-State Issues

- Expanding beyond the “home” state can require nexus determinations and additional state filings.
- Sales tax complexities (especially with online sales in multiple states).
- Local business taxes or regulatory fees can add further layers.

## Recordkeeping and Reporting Requirements

- Maintaining accurate bookkeeping is essential for correct annual filings and to handle any audits.
- Quarterly estimates for pass-through entities can be burdensome.
- Deadlines throughout the year (not just April 15) for payroll, estimated taxes, and informational returns.

# The Complexities of Tax Compliance

## Corporate Tax Complexity

- Must file Form 1120 for C Corporations (or Form 1120-S for S Corporations).
- Consolidated returns if the corporation owns multiple subsidiaries.
- Alternative Minimum Tax (AMT) considerations in certain cases.

## Transfer Pricing and Cross-Border Transactions

- Companies with international operations face transfer pricing regulations to ensure transactions between related entities are at "arm's length."
- Double Taxation treaties and foreign tax credits can significantly complicate compliance.
- BEAT (Base Erosion and Anti-Abuse Tax) and GILTI (Global Intangible Low-Taxed Income) rules add further layers.

## Multi-State & Nexus Rules

- Determining nexus for corporate income tax, sales tax, and franchise tax across different states.
- Some states have economic nexus thresholds requiring tax filings even without a physical presence.

## Complex Deductions and Tax Incentives

- R&D Credits, energy incentives, and other specialized credits that have specific qualifications and documentation requirements.
- Depreciation and amortization under MACRS (Modified Accelerated Cost Recovery System) vs. specific industry rules (e.g., real estate).

## Corporate Governance and Reporting

- Larger entities are subject to SEC reporting requirements (for public companies), which may tie into tax disclosures.
- More rigorous audit scrutiny and the need for in-depth tax planning strategies.
- Potential complexities around mergers & acquisitions, corporate restructuring, and international expansion.

# Solutions

## Technology & Automation

- Cloud-Based Accounting:** We set up and manage systems that automate bookkeeping and integrate payroll, banking, and e-commerce data.
- Tax Software Integration:** Our firm uses advanced tax prep platforms to reduce manual errors and generate required forms automatically.
- Real-Time Financial Insights:** Automated dashboards let you see tax obligations and deadlines as they arise.

## Tax Planning & Professional Advisory

- Quarterly Reviews:** Regular check-ins for estimated taxes and financial adjustments, so there's no last-minute scramble.
- Entity Structuring:** We advise on the best legal entity (LLC, S Corp, etc.) and handle setup to optimize tax benefits.
- Specialized Expertise:** Our CPAs and tax attorneys address cross-border concerns, R&D credits, and other complex matters specific to your situation.

## Streamlined Processes & Documentation

- Centralized Record-keeping:** We establish standardized folders (physical or digital) to store W-2s, 1099s, receipts, etc. in one place.
- Tax Calendar & Reminders:** Our team monitors all filing deadlines (federal, state, payroll) and sends proactive alerts.
- Consistent Classification Rules:** We ensure proper worker classification (W-2 vs. 1099) and adopt uniform expense coding to minimize red flags.

## Ongoing Education & Advocacy

- Client Workshops:** We offer training sessions to keep you informed on the latest tax law updates.
- Policy Monitoring:** Our firm tracks new legislation (federal and state) and recommends strategies to stay compliant.
- Industry Advocacy:** We collaborate with professional groups and lawmakers, sharing insights to help push for simpler, more effective tax regulations.

# Pricing

## Individual Income Tax Return

*starting at \$2,000 per return*

INCLUDES FEDERAL, ALL APPLICABLE STATE, AND APPLICABLE LOCALITY PERSONAL INCOME TAX RETURNS

INCLUDES CLIENT ADVOCACY FOR THAT TAX YEAR

ANNUAL CHECKUP MEETING

*NOTE: Additional \$100 charge for each Schedule C, Schedule E, or foreign schedule that needs to be prepared*

## Small and Medium Entity Returns

*starting at \$1,500 per return*

S-CORPORATION, PARTNERSHIPS, AND CORPORATE TAX RETURNS WITH REVENUES UNDER \$1 MILLION

INCLUDES K-1 PACKAGES

INCLUDES CLIENT ADVOCACY FOR THAT TAX YEAR

ANNUAL CHECKUP MEETING

*NOTE: If bookkeeping needs to be done it will be an additional per-hour charge.*

## Large and Enterprise Entity Returns

*starting at \$3,000 per return*

PARTNERSHIPS WITH 10+ PARTNERS AND CORPORATE TAX RETURNS WITH REVENUES OF \$1 MILLION AND OVER

INCLUDES K-1 PACKAGES

INCLUDES CLIENT ADVOCACY FOR THAT TAX YEAR

BI-ANNUAL CHECKUP MEETINGS

*NOTE: If bookkeeping needs to be done it will be an additional per-hour charge.*

## International Tax Reporting and Returns

*starting at \$2,000 per return*

INCLUDES FORMS 1040-NR, PARTNERSHIPS WITH INTERNATIONAL RETURNS, INTERNATIONAL TAX REPORTING, AND ALL OTHER INTERNATIONAL TAX COMPLIANCE

INCLUDES K-3 PACKAGES

*NOTE: If bookkeeping needs to be done it will be an additional per-hour charge. Please also note that Tax Advocacy Services for International Tax Clients will be subject to an additional per-hour charge.*

# Pricing (continued)

## Payroll and Related Tax Compliance

**\$5,000/yr or  
\$500/mo**

INCLUDES RUNNING SEMI-MONTHLY OR MONTHLY PAYROLL

COMPLETING QUARTERLY 941s AND ANNUAL 940

CALCULATE, PAY, AND FILE FEDERAL AND STATE UNEMPLOYMENT TAX AND RELATED RETURNS

## Sales Tax and Related Tax Compliance

**\$10,000/yr or  
\$1,000/mo**

S-CORPORATION, PARTNERSHIPS, AND CORPORATE TAX RETURNS WITH REVENUES UNDER \$1 MILLION

INCLUDES K-1 PACKAGES

INCLUDES CLIENT ADVOCACY FOR THAT TAX YEAR

ANNUAL CHECKUP MEETING

*NOTE: If bookkeeping needs to be done it will be an additional per-hour charge.*

## Total Compliance Package

*starting at \$15,000/yr or \$1,500/mo*

ALL TAX RETURN SERVICES FOR THE ENTITY, INCLUDING INCOME TAX, PAYROLL TAX, SALES TAX, AND OTHER TAX COMPLIANCE NEEDED

INCLUDES CLIENT ADVOCACY FOR THAT TAX YEAR

*NOTE: If bookkeeping needs to be done it will be an additional per-hour charge.*

## Tax Planning and Strategy Services

*Pricing varies per project*

WE CAN ASSIST YOU WITH AD HOC, TAX PLANNING, STRATEGIZING, OR ANY OTHER SPECIAL TAX PROJECTS.

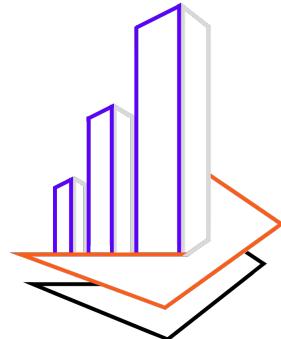
*NOTE: Please note that pricing will be considered on a per-hour basis for ad hoc tax planning and strategy services.*

“We do what we do  
so that you can do  
what you love.”



Vivek Laungani, CPA  
*Founder* • Purewater Financial

# Ready to begin navigating?



Schedule a call with us  
or  
Reach out to us here today!

