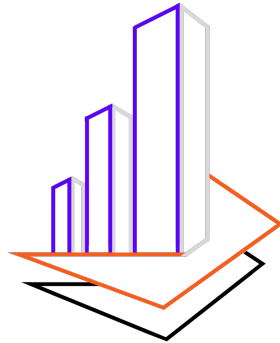


Purewater Financial Success through Clarity.

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



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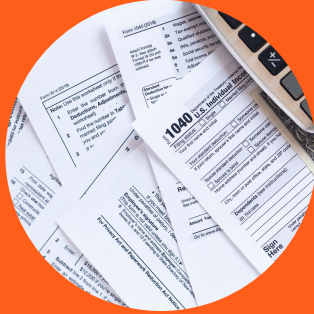
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Services We Offer



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.

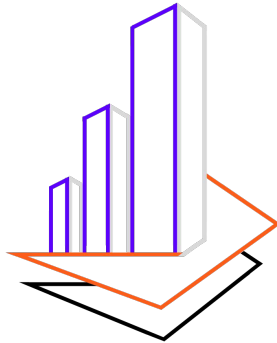
*NOTE: Please note that pricing will be
considered on a per-hour basis for ad
hoc tax planning and strategy services.*

“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!