



CFO Enrollment Program

Phone: 801.571.9900

www.soulencc.com



CFO Enrollment Program

Most small businesses cannot afford to (nor want to) hire a professional CFO. With Soulencc Tax and Accounting, you get the same benefits of having your own personal CFO for a fraction of the cost of hiring a full-time CFO. We do this by acting as a Contracted CFO for you and your company.

Our CFO Enrollment Program is designed to build your financial foundation by

1. Maximizing your liability protection
2. Minimizing your taxes to the extent you want them minimized

Our program has 2 levels of service, Gold and Platinum. Compare our services with the cost that other accounting firms might charge.

Service	Gold	Platinum	Compare at:
Electronic Newsletter	Yes	Yes	N/A
Podcasts (In depth tax topics)	Yes	Yes	N/A
Unlimited Email Correspondence	Yes	Yes	\$200/hour
CFO Meetings	Yes	Yes	\$500/meeting
Year End Tax Meeting/Planning	Yes	Yes	\$185
Maximization Map (Entity ownership & cash flow)	Yes	Yes	\$150/hour
Quarterly Consulting	X	Yes	\$100/quarter
Unlimited Phone Consultation	X	Yes	\$200/hour
QuickBooks Updating	X	Yes	\$75/hour
Average Annual Savings	\$2,000	\$4,000	

*See reverse side for definitions of services.

CFO Enrollment Program **Service Definitions**

Newsletter:

Receive monthly updates on changes with the ever-evolving tax code and how it affects your tax situation.

Podcasts:

Get access to Soulence podcasts that go in depth about various tax topics that affect your tax situation.

Unlimited Email Correspondence:

Never worry about getting billed for asking questions and advice through email.

CFO Meetings:

Soulence will act as your personal CFO. During these meetings we will strategize your specific tax situation, answer all your questions, educate you so you know what to do to legally pay as little tax as possible, ensure your liability protection is in place, and make sure you are increasing your cash flow.

Yearend Tax Meeting/Planning:

Soulence will construct what your tax liability will be for the year and help to implement any yearend tax strategies to reduce how much you pay in taxes.

Maximization Map:

Soulence will create a visual representation of our tax strategy called your maximization map. We help maximize your tax savings, liability protection, and cash flow.

Quarterly Consulting:

We meet quarterly to follow up with our tax strategy, address new issues that have come up, and make adjustment.

Unlimited Phone Consultation:

Never worry about getting billed for asking questions and advice through phone calls.

QuickBooks Updating:

Soulence will review your QuickBooks and make any accountant changes necessary to ensure your records are complete and accurate.



Have Questions?
Feel free to contact us!

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