



Checklist to Identify Opportunities for Additional Services

TAX SERVICES

- State & Local Tax
- Quarterly payroll tax preparation
- Change of form of entity or year end
- Reorganization or liquidation of the business
- Sales or exchanges of business property
- Shareholder distributions or transfers
- Tax projections
- IRS representation
- Individual tax return of chief executive officer

FINANCIAL AND ESTATE PLANNING

- Education saving
- Retirement saving
- IRA, Roth, SEP
- Estate Planning (wills, trusts or gifts)
- Life and general insurance analysis
- Retirement plan administration
- Pension plan administrative accounting
- Section 401(k) plan design
- Second/vacation home

ACCOUNTING SERVICES

- Audit
- Compilation
- Review
- Lease vs. buy analysis
- Payroll services

August Aquila is an internationally known speaker, consultant and writer. He is CEO of AQUILA Global Advisors. He is also the co-author of "Compensation as a Strategic Asset" and "Client at the Core."

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- Stock transfers
- Buy-sell agreements
- Fraud Audits

MANAGEMENT CONSULTING SERVICES

- Buy/Sell Agreements
- Merger & acquisition assistance
- Internal control review
- Business valuation
- Profit improvement consulting
- Costing systems
- Feasibility studies
- Financing, restructuring or reorganization
- Employee manual
- Compensation and benefits program
- Strategic planning
- Inventory or production controls
- Executive search
- Litigation support
- Benchmarking
- Marketing consulting
- Website/webpage consulting
- Cash flow analysis

GENERAL BUSINESS

- Accounts payable check writing
- Payroll (referral)
- Accounts receivable or customer billing
- Automated general ledger
- Bookkeeping services
- Depreciation schedules
- IT consulting
- CFO outsourcing

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