



Client Onboarding

RAMIREZ ACCOUNTING SERVICE, LLC

Sit back and onboard with our Team

WELCOME FROM

Ramirez Accounting Service, LLC

We're so glad you're here!



Your Onboarding Plan

01 INITIAL CALL

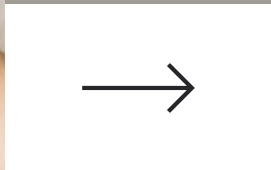
Schedule a phone call with our Onboarding Specialist to discuss our services and receive a preliminary quote

02 QUOTE

We tailor our pricing based on your business needs. You will receive a quote for services so you may review before you onboard.

03 ONBOARD

Sign engagement letter(s), send requested information, and get introduced to our Team.



Introduction to the Firm

We have supported a wide variety of individuals and local businesses with their accounting needs for over 15 years. We have a fun energetic culture and care about our clients and their business needs.

Our Services

TAX	BOOKKEEPING	PAYROLL PROCESSING
<p>Let us help with your individual and business tax needs. From local to federal tax, we've got your back!</p> <p>We can assist with compliance for individuals, sole proprietorships, partnerships, and corporations.</p> <p>Need tax planning? We can assist as well!</p>	<p>Need a hand with your books? We offer an affordable and personalized bookkeeping experience.</p> <p>We believe in the integrity of your books and records and will go the extra mile to make sure we get it right.</p>	<p>We have flexible payroll solutions to meet your employment needs.</p> <p>We can structure our service based on frequency of pay, paycheck delivery methods, and more.</p>

Tax



Understand your Taxes

We don't believe in making you sign without truly understanding your underlying tax liability / refund. We will also work with you to identify potential tax saving opportunities.

Services:

- U.S. Individual Income Tax Return (Form 1040)
- U.S. Return of Partnership Income (Form 1065)
- U.S. Income Tax Return for an S Corporation (Form 1120-S)
- U.S. Corporation Income Tax Return (Form 1120)
- Texas Franchise
- Sales & Use Tax Reports
- Mixed Beverage Gross Receipts Tax Reports
- Mixed Beverage Sales Tax Reports



Bookkeeping



Understand your Business Financials

The cornerstone to good bookkeeping is communication & transparency with our clients

Summary:

We will record your business transactions and deliver easy-to-read financials for your business needs.

On a monthly basis, the bookkeeper on your account will reconcile accounts and classify financial transactions. The bookkeeper will contact you to clarify any pending questions and/or to answer any of your questions.

The account will be reviewed periodically internally by Management.



Payroll



Summary:

We offer flexible payroll solutions to tailor to your business needs.

This service can be provided on a weekly, bi-weekly, semi-monthly, monthly, quarterly, or on a yearly basis.

We can coordinate delivery of checks or have them directly deposited to your employees.

We take care of the back-of-office work - creating paychecks, coordinating payroll liability deposits, and filing quarterly and annual reports.

Flexible Payroll Solutions

Be ready for Payday!





Ready to Onboard?

Let's learn about your business first!

LET'S BEGIN!



Onboarding Questions

Please help us learn about your business

- What is the legal name of your Company(s)?
- How many owners?
- Do you know how you are classified for Federal Tax Purposes (1040, 1065, 1120-S, 1120)?
- Do you know if your financials are currently reported on a Cash or Accrual Basis?
- What P.O.S. System do you use, if any?

Onboarding Questions

Please help us learn about your business

- ✓ What platform do you currently run your payroll on, if any?
- ✓ What platform are you using for Bookkeeping, if any?
- ✓ Are your financials and payroll activity caught up year-to-date?
- ✓ From your knowledge, are you currently in compliance with all federal and local taxes?
- ✓ Why are you looking to change from your current accountant?