



The Action of forming a Unified Whole through business efficiency

- Changing the Status Quo
- Funnel Clear Communication
- Analytics Driven
- Client Focused

** Services through Prewitt CPA, a Cohesion Company
* Services through Cohesion Wealth Advisors, a Cohesion Company



Core Focus: To contribute to our clients' successes by being their most THOUGHTFUL and Trusted Advisor.



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Tax Strategy and Preparation

Benefits, Insurance Services, & 401k Planning

Thoughtful Books/Reporting/Consulting

- Business Structure Evaluation
- Compensation Analysis based on Business Structure
- CPA & Attorney Coordination
- Tax Consulting
- Sales Tax Consulting
- State/Franchise/Other local tax Analysis
- Identification of Missed Tax Deduction Strategies
- R/D Tax Credit Analysis (Sector Specific)
- Tax Preparation
- 3-year Amendment Analysis
- Estate Planning & Minimization

- Benefits System Analysis and Implementation (What is the best plan for you)
- 401k/Another Plan Analysis
- Executive Compensation Analysis
- Full Compliance review and Technical Implementation
- Business Protection Analysis

- Thoughtful and Inquisitive bookkeeping
- Bank Reconciliations
- Monthly Oversight and Communication
- Financial Statement Analysis
- Manage Future Growth (Bankability)
- Account Coordination
- Growth and Application Consulting
- Timely Reporting and Brainstorming
- Status Reporting
- General Business Consulting

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