

Accounting and Tax Services

What We Do

Service needed?

Yes

No

NA

Accounting Services

QuickBooks Online (QBO) software support

QBO Essentials, Plus, Advanced

QBO Payroll

QBO installation/conversion

QBO bill pay

QBO training

Core accounting support

Transaction input/adjustment

Bank/credit card reconciliation

Accounts receivable: invoices, sales tax, etc.

Accounts payable: vendor billings, 1099's, etc.

Payroll processing

Third-party software interface

Financial reports/statements

Internal bookkeeper support: training, backup (sickness, vacations, etc.)

Advanced support services

Chief financial officer (CFO) services: financial planning/analysis optimization

Business development (BD) services: system/process optimization; business transition

Microsoft 365: team productivity, communication, collaboration; Teams site setup.

Tax services

Federal filings

Form 941: deposits, quarterly report

Form 940: deposits, annual return

Forms W-4, W-2/W-3

Form 1099/1096

Forms 1120, 1120S, 1065, Schedule C

Form SCU 20004

Form I-9

State filings

Form WTH 1001: deposits, quarterly report

Form OES-3: SUTA payment, quarterly report, rate update

Form W2/W3

Form 512S: Small Bus. Corporation

Form 901: Tulsa County

Form SST 20002-A

Form SCU 20004

Form OES-112

Form SOS 0097: LLC Annual Certificate

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