



# Business Solutions

TRUSTED ADVISORS

# Accounting Solutions

EXPERIENCED CONSULTANTS

## **EFFICIENT ADVICE, LLC**

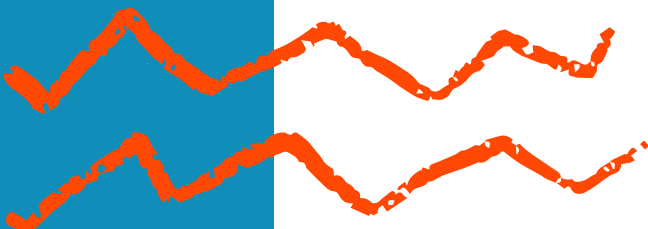
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*Efficient Advice, LLC* is a solution-focused organization. We offer a suite of quality services that will help you to achieve your objectives successfully.

Our mission is to become your trusted partner by re-imagining the current status quo, reviewing your needs, identifying opportunities, and making it better. That's how we ensure your success.





**EFFICIENT ADVICE, LLC**

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# ACCOUNTING SOLUTIONS

Your Extended Team

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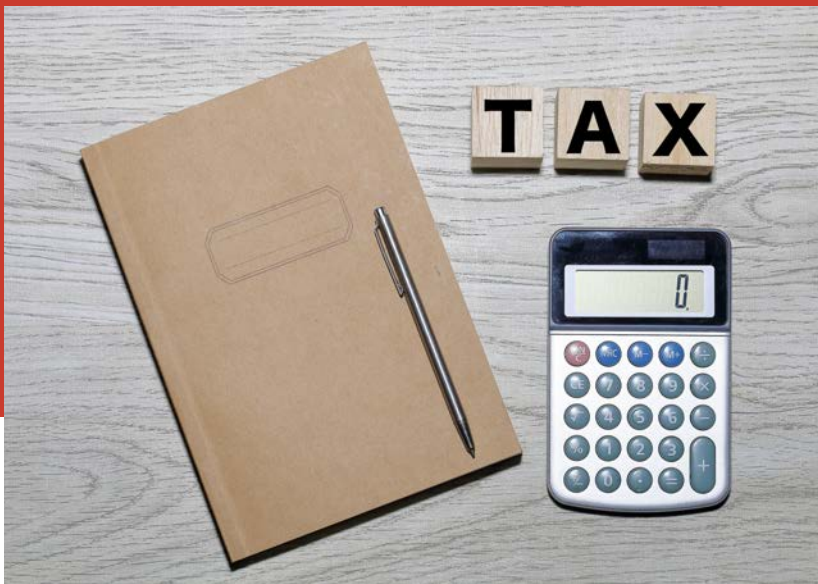
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EFFICIENT ADVICE, LLC

# Tax Accounting

*Let's work together and build a customized strategy to help you maximize your eligible tax benefits and increase your income. We take the time to review and understand the IRS publications so that you do not have to.*



## TAX AMENDMENTS

If you have doubts about your tax filing from last year, do not worry, bring them to us, and we will review them to ensure they were done accurately, lawfully, and with your best interest in mind.

## TAX PLANNING

Tax planning is a year-round process to maximize profits and minimize tax liabilities. As experienced tax professionals, we serve our clients to achieve this critical business activity while increasing the retention of their hard-earned income. We explore every legal tax benefit, including; credits, deductions, allowances, rebates, concessions, and exemptions to ensure our clients receive what they deserve by law. We will analyze your financial situation from a taxation point of view.

Proper tax planning will help you anticipate tax liabilities to optimize your tax situation.

## BUSINESS

Once you have your entity's income statement reports, it will become essential to identify your taxable business income. This is a mandatory exercise if you want to comply with the IRS.

Our years of experience and hundreds of clients will give you peace of mind to avoid missing a filing deadline, have accurate reporting, stay away from fines and fees and not worry about how to reconcile the expectations of the changing law with your data.

## INDIVIDUALS

When you work with us, we can help you file your *federal* and *state* income tax return hassle-free.

We work with clients across all tax tiers, classifications, and/or statuses. Whether you are single, head of household, married with or without children, have properties, or own a business, we can prepare your tax return to get you the highest refund applicable by law. If you bring your last year's tax return, we can review it to ensure you did not miss any tax benefit.

*On average, more than 60% of small business owners feel they do not have enough knowledge about finance and accounting.*

EFFICIENT ADVICE, LLC

# Payroll Services

*A happy workforce is an engine to run a successful business. Employees expect to be compensated for their efforts. Exceed their expectations by running a smooth payroll process. That's what we offer!*



## COMPLIANCE

We give you peace of mind that your business will be in compliance with applicable laws, taxes, and deductions. We live in the world of tax legislation and understand what it takes to manage your business operations.

Our services will ensure we process your information correctly when it comes to the Payroll register, wages, employee tax withholdings, and all corresponding salary information needed to run a successful business.

## DIRECT DEPOSITS

Convenience, accuracy, and cost-savings are some of the benefits associated with payroll payments via direct deposits. Today's lifestyle requires that we all save, whether it is saving time in-line waiting to cash your manual check or saving on convenience fees at check-cashing establishments. It feels refreshing to get your payroll payment directly into your financial institution on your payday morning. Getting pay error-free is just great. Let us help you with payroll payments with direct deposit.

## CHECKS

While it is no longer a common practice to issue manual checks, there are several reasons why you might need to be prepared to issue a manual payment, for example, a payroll error or a termination. However, robust payroll processes must account for these manual payments to reconcile all employees' earnings, withholdings, and deductions.

## REPORTS

Have confidence when generating year-to-date annual earning reports, W-2s or 1099s, 940, 941, and or 8974 forms. We know how to manage the payroll data, interpret IRS tax regulations and accommodate your payroll cycle to create the reports needed by your employees and required by laws.

Your employees trust you to "have their backs." That includes being able to run reports based on various business needs. You should not stop focusing on growing your business to address administrative requests. As an extension of your team, we will take care of their request. We will have your back so that you can have their back.

*Avoid fines due to payroll miscalculations. Stay in compliance with mandatory federal, state, and local payroll taxes and deductions. Reduce manual errors. Rely on a consistent schedule to pay your employees. Focus on growing your business while we manage your payroll process.*

*"At first, we did not see the value of using a formal payroll process. Now, with the assistance of **Efficient Advice, LLC** - Accounting Solutions, we have grown our operations, can focus on strategic decisions and our employees are happy to get paid error-free. Thank you, **Efficient Advice, LLC**"*  
*- Yoisis R. (Leimax, Corp. NY).*



# Bookkeeping

All business owners must know how to measure the true success or failure of their business operations. To accomplish these important tasks, smart business owners should understand how much income is received and its sources, how much money is spent, and why. This is where effective bookkeeping becomes a must-have process.

Bookkeeping can help you with cash management, plan and achieve business objectives, detect suspicious business activities and prevent fraud.

# Key Benefits

- **Financial health visibility.** Know what your business owes (accounts payable), what others owe you (accounts receivable). Generate income statements and balance sheets, profit & loss reports.
- **Decision making.** Be prepared to apply for a loan and grow your business.
- **Get ready for tax season.** Keep your financial records up-to-date and be confident of your data. Be prepared for a smooth tax season.
- **Reduce costs.** Out-of-dates books and records can result in expensive last-minute projects with accountants to document transactions, fix errors, and balance your books. Be in control of your finances.

# Financial Statements Preparation

We will bring you peace of mind by preparing your financial statements and give you a clear picture of your company's financial health for a given time period. Remember, others use these important financial documents to measure your company's performance. Make sure you know how well your business is doing and have the documents to prove it.



# Bank Reconciliation

This is a critical accounting activity to organize and document your financial records properly. Maintaining accurate bookkeeping of these records can assist you in the early detection of fraud, assess your business expenses, and stay in control of your finances.



# BUSINESS SOLUTIONS

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*Helping you design success!*



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**Prepared by**  
**Efficient Advice, LLC**

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EFFICIENT ADVICE, LLC

# Consulting

*Our team brings more than 15 years of consulting experience advising individuals and companies on reducing costs and maximizing return on investment. We are a solution-focused organization and the trusted partner of our clients.*



## OUR APPROACH

We bring you our passion for process improvement, best practices, and thoughtful advice to enhance your processes. We can work with your organization to identify process gaps, assess resources, define expectations, and develop result-driven recommendations while maximizing opportunities.

We also offer a suite of quality services that will help you achieve your objectives quickly and smoothly. That's how we ensure your success. We did not get here alone. Let us show you how to do it!

## OUR TEAM

Our consulting experience will give you a different perspective to make it better! Our team includes; Certified Corporate Trainers, Six Sigma Black Belt Professionals, Lean Project Managers, Authorized Tax Advisors, and Notary Public Agents, among other professionals.

Whether you are looking for a strategic alliance with the right partner or a special skill set or tool, give us a call today. Together we will create and refine your plan for success.

## WHY US?

We bring you industry experience without corporate price tags. We leverage cutting-edge technology to run our operations, including; virtual conference tools, electronic signatures, secured clients portal, industry-leading accounting software remote assistance, video editing software, various payment options, and above all, world-class customer service.

## OUR CLIENTS

We work with clients across the business spectrum. Our current market segments are primarily comprised of; *small business owners, education leaders, local government entities, transportation operators, international import and export market players*, among others.

*Our biggest reward is our customer's success. Read what our clients think of us by visiting; <https://www.efficientadvice.com/testimonials>*

*"This partnership supported the district's commitment to meet the needs of our clients while transitioning to a virtual world — in English and Spanish. Efficient Advice's commitment and expertise contributed to the success of our business objectives."*

*- Roberto S. (Yonkers Public Schools, NY).*

EFFICIENT ADVICE, LLC

# Training

*Our training courses are designed and led by subject matter experts in our areas of focus. We leverage 15+ years of experience working with hundreds of organizations to improve their processes and meet their business objectives. Our courses cover an array of topics in business management, technology, professional development, and many certification programs.*



## WEBINARS

Our webinars are designed to provide you (in approximately 60 minutes) the information you need to improve your business process. Our topics are current and relevant to your profession.

No equipment setup is required. Accessible from anywhere, anytime. The learning is connected to real-life examples, which allow participants to transition from theory to practice. Our goal is to implement knowledge longevity. Join our next webinar and see for yourself!

## CLASSROOM STYLE

We've helped many organizations improve what they do, increase efficiency, and maximize their investment in people and technology. We can customize the training program that can meet your needs and expectations.

Each workshop comes with all the necessary support materials to make the training a successful event, including; *PowerPoint presentations, workbooks, tests, certificates of completion*, etc. We focus on non-conventional training methods to achieve results-oriented goals.



## NASBA

Efficient Advice, LLC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.



## INTERNAL REVENUE SERVICES

Efficient Advice, LLC is authorized by the Internal Revenue Services (IRS) to offer continuing education (CE) credits to tax professionals looking to improve their education and maintain their annual certification. We can train you on specific topics according to Circular No. 230, §10.9 (a).

## DELIVERABLES

- Customized Training Programs
- Certified corporate instructor-led sessions
- Digital training materials
- Personalized certificate of completions
- CPE & CE eligible courses
- Content available in English and Spanish

*"An investment in knowledge always pays the best interest."*

*– Benjamin Franklin*

# Optimization Review

*As you continue to grow and expand your business operations, there comes a time and need to upgrade your business. That's when we come in. We can assist you in taking your business to the next level.*



## OUR APPROACH

We love to help our clients reach new heights, meet their customer's needs, and exceed their expectations. Our multi-disciplinary experience allows us to review your business, find inefficiencies, identify areas of improvement and share solutions-focused recommendations.

As an independent resource, we can assess your operations to let you know how to maximize opportunities and increase efficiencies.

## HOW CAN YOU BENEFIT?

Our Optimization Review Services will look to evaluate key business processes that can have a direct impact on your business growth.

As a result, you will be in a better position to maintain a successful and sustainable business.

## Our Process

Our goal is to assess your current operations, understand your business aspirations, explore opportunities, and put you on the path to success. We do it by reviewing the following business areas. When optimizing your business, you would want to;

- Ensure Compliance
- Lower Costs
- Reduce Risks
- Simplify Operations
- Uphold Security
- Improve Customer Satisfaction
- Improve Quality
- Enhance Consistency

You could choose to modify the scope of our review based on your priorities or specific business needs.

## WHY DO IT?

Forward-thinking businesses should stay in a constant search for growth and improvement. Whether it gets done by reducing waste, lowering costs, increasing efficiency, or improving customer service, a business must constantly evolve to avoid becoming obsolete.

## WHY DO IT WITH US?

Our consultants bring over 15 years of experience across many industries, including; financial services, manufacturing, transportation, auditing, and education, among many others. We are *Six Sigma Black Belt Certified*, *Six Sigma Green Belt Certified*, and *Project Management - Lean Process Certified*. We know what to look for and how to fix it.

***Let us help you design success!***

# Explainer Videos

*Maximize the benefits of using this innovative technology to create purpose-built messages, improve your communication with your audience, increase engagement, make it fun and entertaining. In 60 to 180 seconds, your customers can receive your value proposition and a reason to get in contact with you.*



## WHY USE THEM?

Explainer videos, also known as animated videos, allow you to fully define and design your branding message and deliver it to your audience how you want them to receive it. These videos can be used to present products or services. This modern form of marketing transforms an average ad into a memorable message.

Let's not forget that Explainer videos improve Search Engine Optimization (SEO).

## INTERESTING STATISTICS

- **10-20 seconds** = Average time spent at a website
- **96%** = Customers believe a video helped them make a purchase
- **95%** = Viewers retain a message obtained by a video
- **20%** = People who remember "read" information
- **10%** = People who remember "heard" information
- **58%** = Consumers ready to trust companies with videos

## 8 Key Characteristics

We can help you maximize the benefits of using this amazing technology to expand your market reach, increase your success rate and turn your ideas into a unique, personalized message. Every successful explainer video includes some of these key characteristics;

- Purpose-built messages
- Increase engagement
- Helps understanding
- Make it Timeless
- Audience Agnostic
- Fun and Entertaining
- Brand Development
- Innovative

## OUR PROCESS

We partner with our clients to work with them side-by-side throughout the entire process. Together we; *dream it, script it, visualize it, and draft it*, then we add *voice-overs, music, branding*, and eventually *produce it*. These fun and collaborative projects create final outputs fully vetted by our clients.

## STILL NOT SURE?

Ask yourself/your team the following questions. Then, review other's animated videos and assess effectiveness. *How long is your elevator pitch? Does it always come out the same way? How many words do you need to communicate your value proposition? Is your message memorable?*

**Contact us today  
to bring your  
message to live!**



LET'S US BRING YOU  
PEACE OF MIND

## MAKE THE RIGHT INVESTMENT FOR YOUR BUSINESS

### OFFICE

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### CONTACT US!

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