


## AP MENU OF SERVICES

Our value is the sum of the outcomes and experiences we deliver to our clients. It is most often measured in the time we help save them, the goals we help them reach, the money we help them keep, and the peace of mind we help them create.

### THE ANCHOR POINTS OF A SUCCESSFUL CLIENT RELATIONSHIP

Mountain climbers set anchor points so they can focus on reaching the summit without fear of falling. Archers establish anchor points to ensure consistent form and steady aim. Our comprehensive menu of services focuses on four Anchor Points of a Successful Client Relationship to provide you with the stability and security you need to stay on target and achieve your goals through:

- 
- **Communication** - we will earn your trust by understanding what is important to you.
  - **Processes** - we will leverage technology and implement systems and processes that save time and provide reliable information.
  - **Analysis** - we will utilize the data generated by your accounting system to better understand what is happening in your business.
  - **Strategy** - we will convert our analysis into actionable steps that elevate your business.

We are grateful for the opportunity to assist you in choosing the services from this menu that will help you reach your goals.

SEDALIA  
2700 Matthew Drive  
660-827-4990

MARSHALL  
2751 S Odell Ave.  
660-886-6815

LAKE OZARK  
2729 Bagnell Dam Blvd.  
573-964-5739

CAMDENTON  
985 East US Hwy 54  
573-346-4510



We have four offices and a team of professionals dedicated to your business and success.

- Elevate
- Strategize
- Maintain

The services in these categories will create value for your business at different levels. Each package is customized to your business wants, needs and goals.

## ELEVATE

- **Business Owners Toolkit**  
Walk through your business structure and common business practices to help ensure you're not leaving money on the table through missed deductions, misunderstood rules, improper business structure, etc.
- **Succession Planning**  
Identify and develop your successors so you know that your business will continue into the next generation.
- **Mergers and Acquisitions**  
Assistance with due diligence, deal structuring and tax planning.
- **Business Valuations**  
Estimate the economic value of an owner's interest in a business so you have trusted numbers for a sale or acquisition.
- **Estate & Trust Planning**  
Assist in evaluation, development, and implementation of your customized estate plan.
- **Process Improvement**  
Evaluate and optimize the way your business carries out its essential functions, to remove waste and gain efficiencies, saving time and money.
- **Workplace & Culture Consulting**  
Gather data about your team and your culture through proven workplace assessments, then learn how to utilize that data to improve workplace communication.
- **Strategic Planning & Visioning**  
Our process focuses on building consensus and alignment while determining strategic objectives, measurements, supporting initiatives, due dates and responsible parties. All of this is built on your company's Vision Mission, and Core Values.
- **Fractional CFO**  
We provide decision-making and business strategy for business owners.

## STRATEGIZE

- **Tax Planning & Strategies**  
Tax planning to set tax return expectations and identify strategies to improve overall outcome and reduce tax.
- **Budgeting**  
Collaborative development of annual budget, with actual versus budgeted performance reports available to management.
- **Cash Flow Projection & Projected Financial Statements**  
Collaboratively forecasting your financial position in order to plan for major purchases, seasonal fluctuations, business ownership changes, outright sale of business, etc.
- **Business Plan Development**  
We spend time with clients strategizing and developing business plans to improve performance and efficiency.
- **Accounting Software Selection, Implementation, Training & Support**  
Let our team of certified technicians help you find efficient accounting solutions with unlimited support.
- **Cost Segregation Study**  
We evaluate your commercial real estate purchase or development to accelerate depreciation deductions and increase the rate of return on your real estate investment.
- **App Advisory Services**  
Given your need for an app that meets a specific need, we identify possible solutions and work with you to successfully implement the perfect app in your business.
- **Controller Services**  
On an as-needed basis, we bring analytical horsepower to help you understand and improve the finances of your business.

## MAINTAIN

- **Tax Return Preparation**  
Tax Return Preparation  
Preparation of individual, business, trust, and estate returns.
- **Audit, Review, Compilations & Preparations**  
Financial statements in your required format.
- **Accounting Operations**
  - **Payroll & Sales Tax Services**  
Paperless preparation with electronic filing and payment of taxes. Saves time and reduces stress.
  - **Online Accounting**  
24/7 access to a cloud-based accounting system with secure back up. We provide real time accounting data that is accurate so you can make management decisions based on real data.
  - **Bill Payment**  
Streamline and digitize the way you pay your bills, increasing your mobility and creating value to your vendors through ACH payments.
  - **Back Office Outsourcing**  
Let us be your back office by providing all the functions an onsite bookkeeper would provide.
  - **Insurance Audit Collaboration**  
Facilitate work comp and general liability insurance audits so information is readily available for auditors and required reports are completed accurately.

Learn more at

[www.anchorpointcpa.com](http://www.anchorpointcpa.com)

ANCHOR POINT  
advisory group