



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.

Your success is our success!

We believe in the value of relationships. We view every client relationship like a partnership, and truly believe that our success is a result of your success. We are committed to providing close, personal attention to our clients, and we strive to develop the deepest understanding of what is important to you.

Our mission is to deliver results and create experiences that enhance the well-being of our clients, our team, and our communities. To do this effectively, we strive to maintain an understanding of what truly matters to those we serve. Then, upon the foundation of deep, communication-driven relationships, we provide tools, expertise, and strategies that save time, remove stress, and help our clients enjoy their lives and businesses more than ever.

We're ready to serve you with the menu of services on back.

Sedalia

2700 Matthew Drive
660-827-4990

Marshall

2751 S Odell Ave.
660-886-6815

Lake Ozark

2729 Bagnell Dam Blvd.
573-964-5739



WILSON TOELLNER
CPA

Wilson Toellner CPA

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

Our service packages are designed to help you comply, perform and thrive.

- Consultant
- Advisor
- Technician

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.

CONSULTANT

- **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.
- **Human Resources**
With our strategic partners, we can help provide workforce planning & employment solutions, policy formation, and human resource development.
- **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.
- **Litigation Support**
Our financial and technical experts provide expert testimony or advice to your legal team.

ADVISOR

- **Tax Planning & Projections**
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.
- **Outsourced CFO Services**
On an as-needed basis, we bring analytical horsepower to help you understand and improve the finances of your business.

TECHNICIAN

- **Tax Return Preparation**
Preparation of individual, business, trust, and estate returns.
- **Audit, Review, Compilations & Preparations**
Financial statements in your required format.
- **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 backup. 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**
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.wtcpa.com.

