LOUIS TOMMASINO
CPA & ASSOCIATES

Your Most

Trusted Advisor

A Process That

Provides Value

We Turn Knowledge Into Value To Benefit Our Clients:

- Individuals and families
- Established and aspiring business owners
- Taxable estates

We Resolve:

- Messes
- Transitions within families
- Financial projections
- Complex tax issues

Client Centered

Our 3-Step Proactive Process

Review

Pre-Engagement – Introductory Visit

During your introductory visit, we listen and ask questions to gain a basic understanding of your particular situation and concerns. When appropriate, we explain our planning process and set a time for our next meeting—which may include your other relevant advisors.

Gathering Information and Evaluating Your Needs

Everyone has a concern when it comes to the tax, accounting, business management, trust, and estate needs for their family and business. We are patient in our careful investigation and it shows in how we document and bring the many pieces of the puzzle together for a comprehensive analysis of your situation.

We will need information to determine your path to success. If you would like us to review your affairs, we will quote a fee through our engagement letter and would appreciate receiving the following data to better estimate our level of support:

For families and individuals:

- Your most recent and previous year's individual tax return
- W-2s, 1099s, Schedule K-1s, 1098s and documents pertaining to real estate
- Brokerage statements from stock, bond or other investment transactions
- Your current estate plan

For companies:

- Your most recent and previous year's corporate tax return
- Financial statements or bookkeeping data
- Existing corporate and business documents

Design

Experience Leads the Way

Our 20 years of experience in our industry makes it possible for us to develop an immediate plan of action to resolve any issues that are affecting your tax and financial health. We use this understanding to bring together a combination of strategies that specifically meet your needs.

Building the Plan

Through the use of the information we have received, we build our plan to meet your expectations through the use of outcome analysis and narratives. We present a polished plan and set specific fees, timelines, and goals for implementation.

Execution

Plan Implementation

Based on our conversations and chosen path to success, we will offer an engagement of services that fits your needs. We have the ability to act immediately on your behalf as your professional services representative and based on our plan, we promptly begin reporting results to you.

Expertise

That Enhances Your Financial Confidence

Tax Management

- Minimizing tax liability
- Regulatory environment analysis
- Maximizing cash flow
- IRS representation

Accounting Services

- Business and personal financial statements
- Corporate intelligence and bookkeeping
- QuickBooks assistance and training
- Accounting setup and support
- Estate and fiduciary
- Litigation support

Business Management

- Outside CFO services
- Risk management (insurance coverage)
- Multi-state tax return preparation
- International taxation
- Tour accounting (entertainment)
- Royalty distribution and accounting

Integrated Strategies to Minimize Risk and Preserve Your Wealth

Assurance & Advisory

- Compilation and reviews
- Accounting implementation support
- Financial projections
- Debt and finance advisory
- Transaction structuring and negotiation
- Business succession

Estate and Trust Administration /Tax Preparation

- Trustee services
- Trustee and beneficiary assurance
- Asset funding analysis
- Probate accounting
- Estate tax planning services
- Minimizing estate tax consequences

Growing Industry Representation

- Physicians and healthcare professionals
- Biomedical and pharmaceutical
- Manufacturers and wholesale distributors
- Restaurants
- Entertainment and talent managers
- Real estate

Business Consulting

- Entity selection and restructuring
- Cash flow and budgeting analysis
- Acquisition and merger valuations
- Financial and retirement planning
- Employee benefit plans
- IT services for small businesses and individuals

To serve your specialized planning needs, we collaborate with attorneys, financial advisors, insurance professionals, bankers, and other accountants and trusted advisors.

Founded in 1996, Louis Tommasino & Associates serves the San Diego and Arizona communities, providing personal and superior services to business and professional practice owners in a responsive, smart, and cost-effective manner. Our ability to fully understand and cater to your needs, as well as those of your business, is what makes our firm an ideal financial partner.

LOUIS TOMMASINO
CPA & ASSOCIATES
6265 Greenwich Drive, Suite 210
San Diego, California 92122
858.623.0336
www.tommasino-cpa.com