75 Ways We Provide A Superior Client Experience

The People-Focused Process

1. **Creating a Difference that Matters -** Everything we do is based on making a difference that matters for the people we serve.
2. **Continuous Improvement -** We embrace a firm culture of continuous improvement in processes, quality and service.
3. **Clarity of Purpose -** We state Why our firm exists, How we work, What we do and Who we serve so we remain true to our values.
4. **Written Commitments -** We stand behind our work and values with written commitments to the people for whom we work.
5. **Proactive Leadership -** We gladly assume our role and responsibility as our clients' proactive advocate and advisor.
6. **Fixed Price Quoted Up Front -** We quote all our services up front, based on the scope of the work expected. No blind hourly billing.
7. **Price Guarantee -** We will not request compensation for our work unless we first obtain your approval of our pricing arrangements.
8. **Value Guarantee -** If clients are not pleased with the value of our work, we will accept their perception of value as our payment.
9. **Business Site Visit -** We visit the client's business before we start our first project, so we know how the business operates.
10. **Regular Complimentary Conversations -** Our regular conversations, correspondence and meetings with clients are complimentary.
11. **Video Conferencing -** Saves time and travel for personal meetings for discussions and visual presentations of tax returns and financials
12. **Preserving Clients' Time -** Telephone conversations are scheduled by email to avoid wasting a client's time with "telephone tag."
13. **Respectful Communications** - Clients get clear and simple answers, explanations and ideas from us without using technical jargon.

Articulate and Accurate QuickBooks® Bookkeeping

14. **Certified Bookkeeping -** Certified QuickBooks ProAdvisor® has over 40 years experience in accounting principles and practices.
15. **Correct Classifications -** Transactions are carefully reviewed to classify into correct categories for optimum income tax treatment.
16. **Accurate Exact Descriptions -** Special care in creating exact descriptions for account names to provide breakdowns for tax returns
17. **Checking Balances -** Regular reconciliation of cash accounts, receivables, credit card, loans and owner accounts to cross-check balances.
18. **No Forced Balances -** Bank checking and savings accounts are reconciled to the penny. No accounts are "plugged" to force a balance.
19. **QuickBooks Training -** Paced and patient training for client personnel to use bookkeeping software for their company.
20. **Crisis Resolution -** Effective measures to properly diagnose, repair and restore QuickBooks data problems
21. **Conversion from Quicken® -** Efficient conversion from clients using Quicken to convert to QuickBooks with minimum intervention.
22. **Bookkeeping Repair and Restoration -** Special access to senior technical support staff at QuickBooks to ensure quick repairs.
23. **Catchup Services -** Special services available to ensure prior year catch up is done efficiently and accurately
24. **Liaison With Tax Preparer-** Professional presentation of comprehensive of annual bookkeeping documentation to client's tax preparer
25. **Client-Approved Pricing -** Fixed pricing or hourly estimates arranged in advance with client's approval before commencing work.

Exceptionally Thorough and Sustainable Income Tax Preparation

26. **Choice of Tax Preparation Service Level** - Clients choose from three service levels for the best fit for their needs and budget.
27. **Comprehensive Questionnaire** - Saves time, travel, traffic and taxes by uncovering hidden deductions and not requiring an interview.
28. **Discrete Office Facilities** - Located in a quiet residential area, direct access, ground floor, ample free parking, private, great coffee.
29. **Maximum Legal Tax Deductions** - We legally cut taxes by asking questions, fastidious follow up, and applying the latest tax law.
30. **Audit Deterrence Measures** - We proactively add context, dismiss unwarranted presumptions, dispel suspicions and clarify ambiguities.
31. **Audio Commentary on PDF Files -** Clients can listen to embedded audio files of voice commentary on PDF documents.
32. **Disclosure of Specific Tax Savings Generated -** Clients get a list of specific dollar value of the tax savings measures we've adopted
33. **Carefully Worded Deduction Descriptions -** Accurate descriptions of their deductions to avoid misunderstandings or assumptions.
34. **Professional Presentation** - We take special care to present tax returns with correct spelling, grammar and proper capitalization.
35. **All Tax Forms and Schedules Included** - All tax returns include all optional forms and detailed supporting schedules.
36. **Detailed Expense Breakdowns** - High audit-risk deduction categories are further expanded in supplemental supporting sub-schedules
37. **Reality Check** - We conduct a final review from the viewpoint of a tax auditor to ensure tax returns makes sense overall.
38. **Notes on Tax Preparation** - We inform clients about the issues, limitations, assumptions and their preferences we adopted.
39. **Explanation and Report of Tax Bracket -** Explanation of the client's tax bracket and how it applies to future tax planning.
40. **Tax Return Copies Include Worksheets** - Clients' copy includes all worksheets and carryover information for future planning.

41. **Client History on PDFs** - Clients receive PDF files of tax returns, tax organizer, source documents and e-mail correspondence.
42. **Annual Comparative Analysis** - Shows the current and prior year tax return dollar amounts, federal and state tax rates and tax brackets.
43. **Prompt Service** - Tax returns ready for e-file approval within seven business days after all the tax information and clarified and resolved.
44. **Client Advocate**- We present legitimate tax opportunities where the law is unclear or favors the client's position.
45. **Tax Penalty Avoidance Measures** - We recommend timely payment of estimated taxes to avoid penalty assessments whenever possible.
46. **No Reckless Tax Schemes** - We won't jeopardize peace of mind by desperate measures that stretch beyond the boundaries of tax law.
47. **Tax Preparation by One Accountant** - All tax returns are handcrafted from start to finish by one tax accountant. No runaround.
48. **No Offshore Outsourcing to Tax Mills** - No off shoring to deter the potential risk possible security breaches or identity theft.
49. **Review of Prior Tax Years** - For new clients, we review the prior three years for important carryover information, errors or omissions.
50. **Optimized Tax Filing Status** - For married taxpayers, we compute the lowest tax by comparing "joint" filing status to "separate" filing.
51. **Personal Use of Business Vehicles** - Business tax returns include information about mixed business and personal use of vehicles..
52. **Individual Assets Listed** - Individual descriptions for each depreciable asset for identification when the asset is sold or disposed**.**
53. **Direct Access to the Accountant** - No runaround with junior team members who don't know you or can't answer your questions.
54. **Year-Around Access** - We are available year around to answer questions about tax returns at no charge,
55. **No Tax Season Overload** - We limit our practice size to allow us time to complete returns well before tax deadlines and extensions.
56. **E-mail Tax Updates** - Latest tax news, warnings, traps and opportunities through brief, informative messages. No self bluster.
57. **Computer-Modeled Tax Planning** - Explore the alternative tax-saving measures in advance to select the optimum course

Client Attainment of Enduring Financial Prosperity and Independence

58. **Defining Ownership Goals** - Analyze current position, define goals, establish key performance indicators and define time line.
59. **Business Diagnosis** - Determination of current strengths, weaknesses, opportunities and threats and establish priorities to resolve
60. **Business Performance** - Careful implementation of profit and cash flow improvement strategies and measures
61. **Certified Business Valuation** - Know your current business value, understand your opportunities and implement improvements
62. **Business Value** - Increase business equity value by increasing net free cash flow, risk reduction and owner independence
63. **Industry Comparisons** - How the company compares with others in the industry, including key ratios of strength and performance
64. **Transition of Owner's Role** - Elevate the owner's role from crisis manager to strategic planner to realize the owner's vision
65. **Business Independence** - Operational and functional measures to gradually reduce dependence on owners for daily operations.
66. **Owner's Lifestyle** - Increase free time for more pleasure and enjoyment, exploration of new opportunities and reduction of stress

Integration of Multiple Financial Disciplines, Qualifications and Extensive Practical Experience

67. **University Accounting Degree** - University Bachelor of Science degree in Business Administration with a major in Accounting.
68. **California Registered Tax Preparer** - Registered by the California Tax Education Council as a CRTP.
69. **Business Valuation Analyst** - Holds two business valuation credentials and award for best qualifying valuation report.
70. **Advanced Education in Business Advisory Services** - Over 23 years involvement in intensive boot camps, workshops and seminars.
71. **California Licensed Life Agent** - Specialization in life insurance strategies for funding buy-sell agreements and estate taxes.
72. **Year Around Continuing Education** - Seminars, webinars and workshops to stay current on all covered financial disciplines.
73. **Client Bond Protection** - CRTPs are bonded for $5,000 to protect clients and to offer recourse for grievances which may arise.
74. **Experience in Over 92 Businesses Types and Professional Practices** - Provides judgment, understanding, perspective and context.
75. **Successful Accounting Firm** - Successful continuous operation since 1975, providing exceptional services for over 43 years.

Provident Professional Services, Inc.

Accountancy ▪ Taxation ▪ Advisory ▪ Valuation

(949) 583-1040

www.ProvidentProfessionalServices.com

Hello@ProvidentProfessionalServices.com

24552 Raymond Way, #1120, Lake Forest, CA 92630

Providing Accountancy Services not Requiring State Licensure