



" Let a Tax Professional take the stress out of your tax preparation and leave the worrying to us. Often, the money saved by little known deductions can offset the cost of tax preparation plus the benefit of peace of mind."

BETH LINGAT

Tax Specialist

B.S. Degree in Business Administration
Management & Accounting
CTEC Registered Tax Preparer (No. A134381)
IRS Annual Filing Season Program
(AFSP) Participant
Commissioned Notary Public
Certified Loan Signing Agent
Passed Background Check
Licensed, Bonded & Insured

**We're Mobile!
We'll Come to You!**

OTHER SERVICES PROVIDED

We don't just prepare taxes; we also provide the following business services:

- Tax Problems Resolution
- Bookkeeping / QuickBooks
- New Business Formation & Filing
- SBA Loan Assistance and Packaging
- Document Preparation
- Notary for General Purpose
- Notary Loan Signing Service

**QUALITY SERVICE
RELIABLE
AFFORDABLE RATES**

- **FAST REFUND BY E-FILE**
- **PICK-UP & DELIVERY AVAILABLE**
- **BOOKS A MESS ???
NO PROBLEM! WE CAN HELP ORGANIZE IT FOR YOU!**
- **NO TIME TO FILE TAXES, WE WILL COME TO YOU (WITHIN A 10-MILE RADIUS)**



We specialized in tax preparation of individuals, working professionals, independent contractors, sole proprietors and small businesses.

*The Leading Edge
Company*

**Your Neighborhood
Tax Professional**

**Are You Getting All The Tax
Breaks You Deserve ?
It's Not How Much You Make,
It's How Much You KEEP
That Counts !**

**THERE IS HELP !
See Details Inside.**



**Phone: (951) 746-3737
Fax: (951) 746-1167**

E-mail
eClientHotline@gmail.com

Website
TheLeadingEdgeCo.com

In today's fast paced ever changing world of taxes, accounting, and finance, it is increasingly prudent to have a professional in your corner.

QUESTIONS?

- Do you ever wonder if you're paying more than you should to the IRS?
- Did you spend too much time preparing your tax returns last year?
- Do you know when you can discard some of your mounting tax records?
- Did you purchase do-it-yourself tax preparation software last year and wonder if you filed correctly or got your money's worth?
- Do you ever worry about being audited?
- Do you know your taxpayer rights?

ANSWERS!

Hire the services of the right tax professional and you'll be teaming up with an individual committed in lifelong learning and increasing expertise in the fields of accounting and tax. Our commitment and genuine dedication to serving clients with the utmost efficiency and accuracy is our priority. Propriety and efficiency are the key ingredients in helping you minimize your taxes and maximize your financial wealth while saving you valuable time and money.

HOW YOU BENEFIT?

- Minimize your taxes.
- Develop practical tax cutting strategies.
- File your tax returns correctly and on time.
- Make better financial decisions throughout the year.
- Learn how to build your retirement savings.
- Understand how to keep only the records required by law.
- Run your business more accurately and efficiently.
- Implement sound financial techniques.

THE PROCESS!

Through interviews, questionnaires and an examination of your records, we will work closely with you to gain a clear understanding of your particular situation, your tax returns, and finances.

THREE EASY STEPS:

We can prepare your taxes or provide you with our services remotely without you leaving the comfort of your home or place of business.

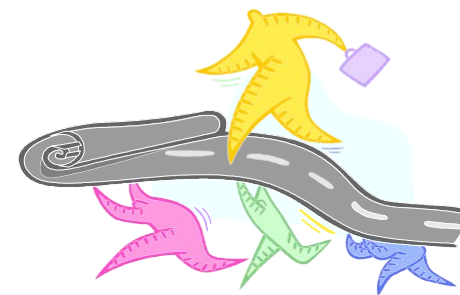
1. Call us at **(951) 746-3737**. We will provide you exact instruction or checklist on what information or documents we need based upon your particular situation.
2. You send us the information or documents we requested by mail, fax or electronically. We'll contact you if we have any questions.
3. We'll then do the work and contact you when the job is completed.

Or, we'll be glad to set-up in-person meeting with you at your convenience. We will come to your home, place of business or another comfortable location within a 10-mile radius from our home office location at no extra charge. Evening or weekend appointment is available. We charge a flat fee no matter how long it takes us to prepare your taxes. And, we always have your best interest in mind with total honesty and integrity.



YOU WILL RECEIVE:

- Personalized service and **FREE E-file**
- Minimized tax exposure
- Thoughtful attention to detail
- Accurate, timely response
- Strict confidentiality regarding your tax and financial matters



TAX PREPARATION CHECKLIST

- Income: All Forms W-2 (Wages), 1099-NEC (Self-Employment Income), 1099-MISC (Misc. Income), 1099-INT (Interest), 1099-DIV (Dividends), 1099-B (Capital Gains or Losses), 1099-G (Overpayment of State Tax Refund or Unemployment Compensation), 1099-C (Cancellation of Debt), 1099-R (Pensions and IRA Distributions), SSA-1099 (Social Security Benefits), Schedules K-1 from Partnerships, S Corps, Estates and Trusts, gambling winnings and other income reporting statements including all copies provided from the payer.
- Tax Adjustments/Credits: All Forms 1098-E (Student Loan Interest), 1098-T (Tuition Fees), 5498-SA (Health Savings Account), Child & Dependent Care Expenses, Moving Expenses, Alimony Paid.
- List of itemized deductions: Medical/dental expenses, real estate/property taxes, mortgage interest, charitable contributions, casualty/theft losses and any unreimbursed job expenses.
- Copy of closing statement if you bought or sold real estate. Provide property details.
- Mileage: Provide vehicle Year/Make/Model, date vehicle placed in service, total mileage, commuting mileage and business mileage.
- Estimated tax payments – date & amount paid.
- Business or rental activities. Provide a detail breakdown of rental income and expenses.
- For more information, visit our website at www.TheLeadingEdgeCo.com. Select "Office Forms" and download the "Tax Preparation Checklist" pdf file.