

CPA Services for Real Estate Professionals and Investors



Minton CPA & Associates, LLC
Certified Public Accountant



32 Years of Experience

Certified Public Accountants

Personalized Services



TABLE OF CONTENTS

2-3

ABOUT

4-5

SERVICES

6

REAL ESTATE PACKAGES

7-8

CASE STUDIES



INTRODUCTION

Whether you are a new agent just starting your career, a seasoned pro, or an active property investor we have the expertise to provide sound advice and tax savings.

ABOUT US

We are a full-service accounting and tax firm designed to serve the real estate professional and investor community throughout Hampton Roads. Locally owned, with more than 25 years experience working in the real estate niche, we are experts in all phases of the industry.

OUR EXPERTISE

Real Estate Investment

As experienced real estate investors, we have particular expertise in this area. From choosing the right legal status to job cost accounting for each property we can help you navigate the constantly changing tax treatment of investments.

Certified Public Accounting

From bookkeeping to payroll to job cost accounting to strategic planning, Minton CPA and Associates has the resources you need.

Professional Advisory

Plus, we have assembled a referral team of professional advisors equally committed to your success. Whether you need help with insurance, benefit programs, a legal question, or financial advice we have the resources to help..



SERVICES



Bookkeeping

Our services include:

Monthly and Quarterly Profit and Loss Statements

Employee Benefit Program assistance
Accounts Receivable and Payable

Revenue and Expense Reports
Corporate, S Corp, C Corp, Partnership,
LLC, and Sole Proprietor Services

Multi-State Tax Returns

Financial Statement Reviews

Inventory Records

Business Tangible Returns

Full Payroll Service, Including
Quarterly Filings

Payroll

Our comprehensive payroll
management services include:

Processing paychecks

Year End Reporting

Workers Compensation Audit Support

Business Retirement Plan Creation
and Management

Preparation of W-2 and 1099's

Quarterly Tax Returns

Filing Federal, State, and Local tax
deposits

SERVICES

Tax Preparation

Our Tax services include:

Federal, State, and Local Tax Preparation

Tax Filing, with Backup Copies

Tax Planning

Tax Reporting

IRS Audit Support

Bookkeeping and Payroll Services

Online QuickBooks access

Consulting Services

Think of us as your Chief Financial Officer...

To effectively manage your growing business you need to surround yourself with professionals.

At Minton CPA's and Associates we are accounting and tax experts and advisors. We meet with our clients two or four times a year, based on your service package. These are invaluable conversations where we look at your current business and investments, but also where you want to grow to.

We offer not just accounting and tax consultation. Through the Minton Advisory Team we offer insurance professionals, financial advisors, and legal counsel for a truly holistic service for our clients.



PACKAGES

SILVER PROGRAM

Total Value - \$2,500

\$167 /Month

Designed for real estate agents who are not property investors:

Individual tax return

Business tax return

Annual tax and business consultation meeting

GOLD PROGRAM

Total Value - \$4,250

\$297 /Month

Real estate agents/investors with three or fewer investment property transactions during the year:

Individual tax return

Business tax return

All schedules for each property transaction

Bookkeeping 2hrs/Monthly

Two tax and business consultation meetings during the year

Access to Minton Advisory Team resources

PLATINUM PROGRAM

Total Value - \$6,900

\$447 /Month

Real estate agents/investors with four or more investment property transactions during the year:

Individual tax return

Business tax return

All schedules for each property transaction

Bookkeeping 4hrs/Monthly

Quarterly tax and business consultation meetings during the year

Access to Minton Advisory Team resources

CASE STUDIES



Real Estate Broker

Business entity was structured incorrectly, and the accounting systems set up by client were not accepted by the IRS auditor. Minton CPAs saved this real estate broker over \$50,000 per year by creating an efficient and effective IRS acceptable accounting system. As an added result this broker had accurate and timely financial information to make informed decisions throughout the year.

Real Estate Agent/Investor

This business was not structured properly. Wages were being calculated incorrectly based on IRS 'fair and reasonable' guidelines. Business expenses were being written off improperly. In addition, this client did not have a retirement plan.

After engaging Minton CPAs this client was able to recapture and save a total of \$125,000 in tax savings..

Real Estate Agent/Investor

When this client came to Minton CPAs there were multiple company entities operating that were not necessary for the business. These were structured incorrectly and writing off expenses that are not allowed. Employee payrolls were being incorrectly calculated. Tax returns were incorrectly prepared and bad advice was provided to client. Through restructuring and good sound advice about properly managing a real estate investment business, client realized a tax savings of \$65,000 per year.

CASE STUDIES



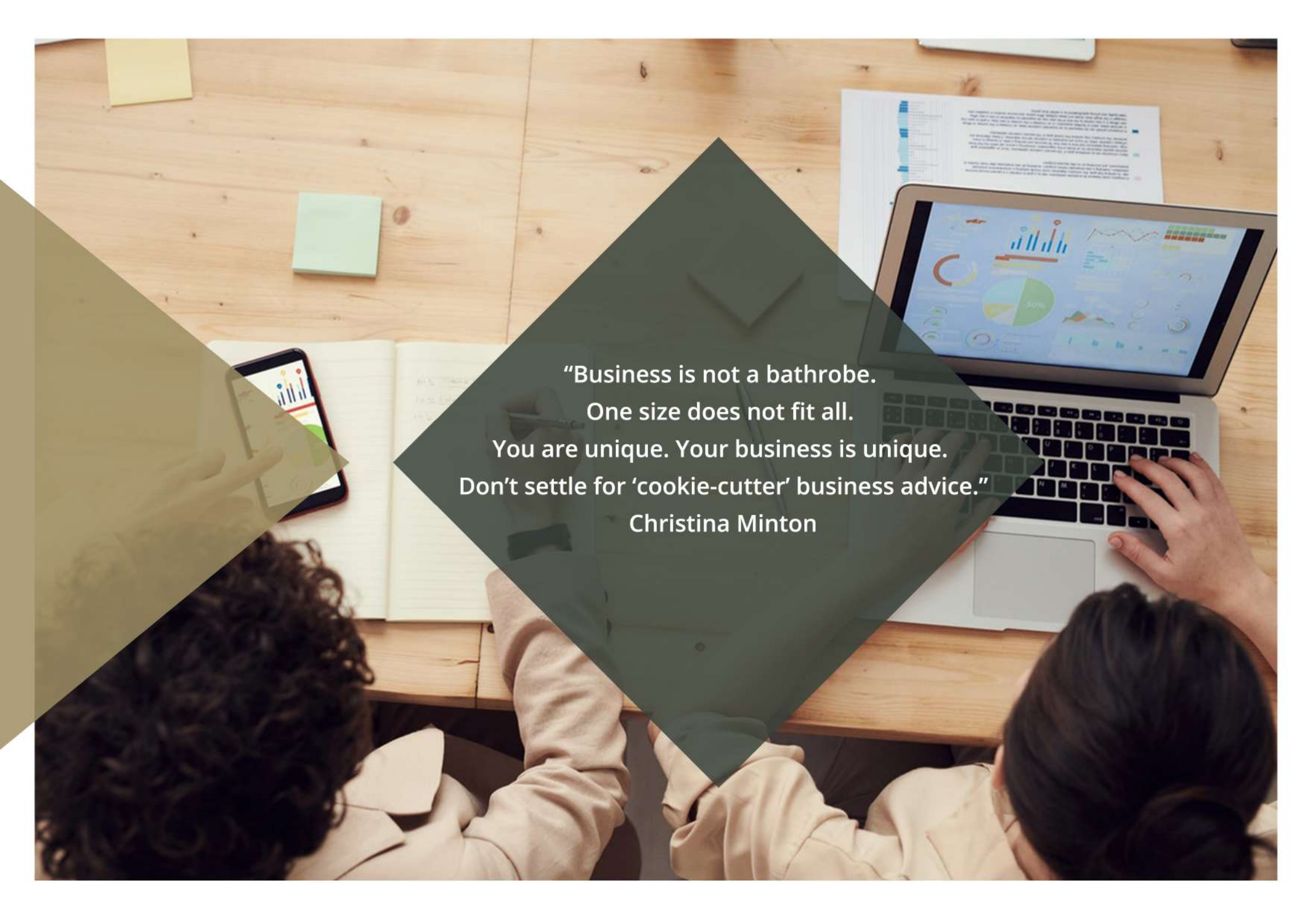
Real Estate Agent/Investor

This client had been given bad tax advice. They were told to treat their real estate business as a hobby, and that payroll was not required. Tax returns were prepared with significant errors; preparer did not allocate inventory to cost of goods sold properly, therefore creating an extreme over/under in tax liability and refunds. In addition, client was not in compliance with the IRS wages base for officers. They wanted to fund a retirement plan and could not adequately do so without the proper wages base. All of these errors caused high risk audit alerts and tax liability volatility equal to \$60,000 a year. The Minton CPAs team has corrected these issues and put the client on a safe track..

Real Estate Agent

Agent had been misguided on auto deductions, taking maximum write off in current year and minimizing write offs in future years and recapture of depreciation. Tax preparer was not educated in the profession of real estate and all of the exceptions and allowable write offs that are unique to this profession.

Minton CPAs are experts in helping real estate agents and investors minimize their tax liability by utilizing every allowable provision of the tax code..



"Business is not a bathrobe.
One size does not fit all.
You are unique. Your business is unique.
Don't settle for 'cookie-cutter' business advice."
Christina Minton

M

Minton CPA & Associates, LLC
Certified Public Accountant



PHONE

757-546-2870

FAX

757-216-9650

EMAIL

alex@cmintoncpa.com

WEBSITE

www.realtorcpa.net