“Sometimes I Feel…Like” ☑ Check All That Apply?

Smarter Choices?

If You Feel Like… There’s No One To Talk To; About:

- Cash Flow Planning…
- Goal Setting & Accountability…
- Business Strategy Development…
- Business Profit Center Maximztion…

Better Results!

Discover the Difference

Dailey choices you make can drastically affect your cash position, profits, future wealth, tax savings, and peace of mind. The biggest difference between businesses that prosper and businesses that struggle, is those that prosper make smarter choices.

It is the successful businesses, who have all the critical financial information they need to make the tough choices, at their finger tips, at all times, that make the smartest decisions!

Timely and accurate financial reports are often the difference between success and failure in today’s competitive business climate.

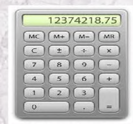
Upstate Tax Group offers affordable and efficient recordkeeping solutions that will help you make the smart cash management choices your business depends on, everyday!

CASH

- ☐ Stressed from cash pressure to make payroll
- ☐ Frustrated because I don’t really know where all my money goes
- ☐ Annoyed I have to put off paying bills until I have the cash available

PROFITS

- ☐ Discouraged by the harder I work, the less I seem to make
- ☐ Discouraged, wondering if I’m making money or breaking even?
- ☐ Stressed every time I turn around, there’s another surprise expense



TAXES?

- ☐ Confused about the new kinds of 401k’s and IRA’s
- ☐ My accountant treats me like a nobody, yet charges big fees
- ☐ Am I missing out on tax deductions that could make a difference?

WEALTH

- ☐ Afraid at the rate I’m going, I’ll never retire
- ☐ If I sell my business, I’m worried I won’t get its true value
- ☐ If I died today, no one would know what to do with my business

PEACE

OF MIND

- ☐ Worried my recordkeeping may not withstand an IRS audit
- ☐ The financial burden is affecting my relationship with my family
- ☐ Threatened by penalties up to 50% for non payment of payroll taxes

Now is the time, to talk to us…

Call (518) 621-5765

UPSTATE
TAX GROUP
upstatetaxgroup.com

Welcome to Upstate Tax Group!

Upstate Tax Group was established with the vision to serve our clients' needs with a holistic approach to their current tax preparation needs **as well as their future tax planning needs and goals.**.

Our firm prepares all forms of tax returns: 1040 personal, Corporate S and C, Partnerships, Trust returns and all other federal forms as well as State, Multi-State, City, RITA, even local.

Our firm offers superior client services and consulting to individuals, professionals, and small/mid-size businesses in:

- Tax Preparation
- Tax Planning Services
- Roth IRA Conversion Strategies
- SS Taxation Reduction Strategies
- Charitable Tax Planning Strategies
- Small Business Strategy Development

Please contact us for tax preparation and tax planning services.

If you just want tax preparation and nothing more, that's ok... give us a call. We will be careful, accurate, and we will provide a good price for great work!

If you want preparation and then to start learning and planning your own tax outcomes, that's where we shine the brightest!

Call **(518) 621-5765** or e-mail us at info@upstatetaxgroup.com to get started.

Now is the time, to talk to us...

Safety of Your Personal Information is Paramount!

Upstate Tax Group is a member of the Co-op Cloud Partners Services. We are proud to only operate in a private and secure, IRS Circular 230 compliant communications network to submit all state and federal tax work documents. We participate in the tax return preparation process via a proprietary nationwide network through the TAXPLANBANK services offered through Co-op Cloud Partners Services, ***so the security of our system is of the highest available anywhere***!

Download Our Intake Form Here
http://upstatetaxgroup.com/about.aspx

A tax planning review appointment can facilitate the process of pulling together your tax information. Our "Tax Scenario Analysis" tools are designed for us to help clients evaluate all of their tax planning options The first step is to complete our Client Intake Form and return it to us via USPS for review, together with your last two years, tax returns that includes prior year information and any carry forward data. We will then call you to make an appointment to come in and go over our findings. But, please ***NEVER*** fax or e-mail the completed forms over the phone lines or internet... **It's not safe!** If you prefer, to save on postage, you may send your completed Client Intake Form and prior year returns over the internet through our Proprietary Secure Client Portal IT System.

UPSTATE
TAX GROUP

upstatetaxgroup.com

Office: (518) 621-5765 By Appointment
E-mail: info@upstatetaxgroup.com

IRS e-file Compliant

MY PRO TAX ADVISOR

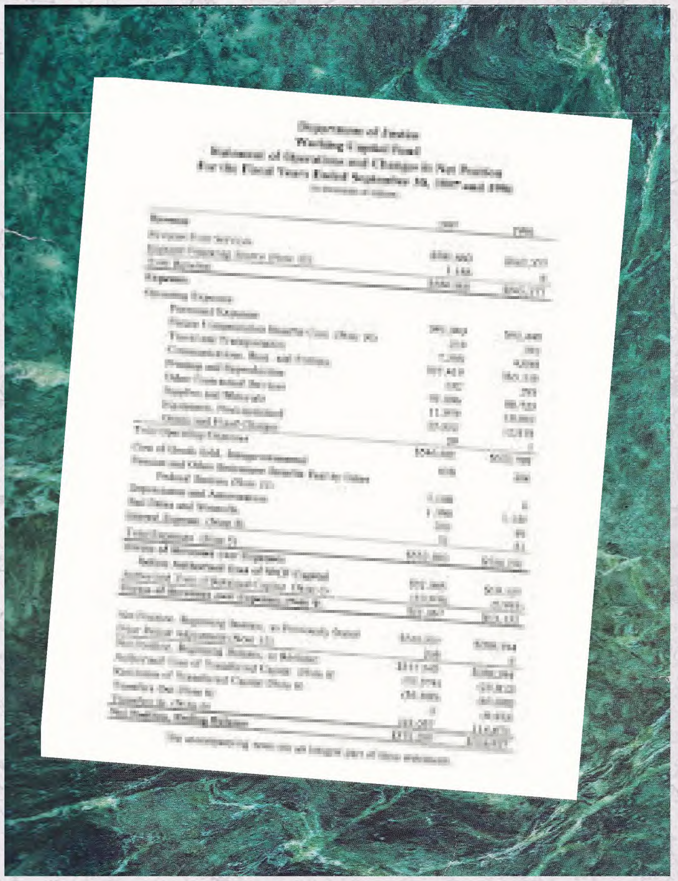
Serving Upstate New York Since 1987

Tax Reporting Solutions

Smarter Choices...

SMALL BUSINESS

Better Results!



upstatetaxgroup.com