

RETAIL



The Internet has substantially changed the way consumers today shop. Product research and reviews, pricing, and purchase are now instant at the touch of the consumer's finger or command via virtual assistant. Retail businesses are changing online and brick-and-mortar operations to be more efficient, from product development to supply chain, to overhead and sales distribution.

Our firm works with numerous retail businesses ranging in size; from small, one-person ownership to large, multi-million dollar stores.

Tax Services

- Income tax return preparation and filing, including multi-state taxes
- Capital asset planning and strategy
- Cost segregation studies
- Corporate tax planning
- IRS audit support

Client Accounting Services

- Business process outsourcing, including bookkeeping, billpay, and payroll processing, filings, and reporting
- Financial statements, reporting, and management reports
- Set up, training, and consulting for QuickBooks® software
- Advisory services on general ledger set-up and internal controls
- Virtual controller outsource and consulting
- Virtual CFO outsource and consulting

Consulting Services

- Business planning, financial projections, and budgets
- Business valuations
- Cash flow management
- Entity set-up and organizational structure
- Business purchase, sale, and merger/acquisition
- Wealth and succession planning
- Retirement planning
- Management consulting
- Ownership transfer planning (buy-ins/buyouts)

Audit & Assurance

- Financial statement audits, reviews, and compilations
- Operational audits
- Internal control reviews
- Employee benefit plan audits
- Fraud investigations and risk management
- Inventory counts
- Agreed-upon procedures

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CPAs and Business Advisors

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Aspen 970-925-1831
Glenwood Springs 970-945-8575
Grand Junction 970-243-1921

Montrose 970-249-7701
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Telluride 970-249-7701