



RICHARD GOODMAN ASSOCIATES, P.A.

Licensed Public Accountant — Accredited Business Accountant — Accredited Tax Advisor — Accredited Tax Preparer

Accounting, Tax Preparation, Consulting & Advisory Services

QuickBooks Pro Advisor, Peachtree Pro Advisor

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State of Delaware Professional Association

SERVICE BROCHURE

Richard Goodman Associates strives to bring you professional services at competitive prices.

Services

- T Bookkeeping
- T Payroll
- T Tax planning
- T Tax preparation
- T Billing
- T Training & Support for QuickBooks or Peachtree
- T Financial statements: Audits, Reviews, or Compilations
- T Financial management, including:
 - budgeting
 - pricing
 - financial planning and projections

Bookkeeping and Payroll

Our Bookkeeping and Payroll Services are fast, accurate and affordable. We are geared towards meeting the needs of corporations, partnerships, sole proprietorships, limited liability companies, small government agencies, not-for-profit agencies, and individuals. We offer on- and off- premises bookkeeping services as well as live and “after the fact” payroll services. Our highly competent and accredited staff provides personal and dedicated service. We utilize various tools for these services such as QuickBooks, Peachtree, Excel, Paradox, and other software packages.

Tax Planning and Preparation

Accurate and affordable are the terms that best describe our tax services. Tax planning, not only tax preparation is crucial to proper financial management. We are committed to helping you with tax planning and preparation services including income tax, payroll tax, e-File, reducing your tax burden, family tax matters, international business tax, corporation, LLC, partnerships, estate and trust tax, and multiple state tax. All of our tax preparers are licensed and/or accredited to provide you with the best tax service possible.

Billing

Billing services are customizable to fit the way you do business. This specialized service is provided to law firms, home care agencies, medical offices, and other service-based businesses.

Training on accounting software technology

We provide software training, set-up, and support for QuickBooks, Peachtree, and various Microsoft Windows or Macintosh based accounting systems. We are members of the INTUIT and SAGE Software professional adviser programs.

Service Plans

Weekly Service Plan

Weekly bookkeeping service
Payroll service
Quarterly and year-end payroll tax preparation including W-2, 1099-Misc, 941, 940, and 944.
Sales or gross receipts tax preparation (up to one state)
Quarterly estimated income tax preparation
Weekly and one year-end financial report (Trial Balance, Income Statement, Balance Sheet, Budgets)
Prepare your year-end business income tax return (federal and one state)
Consultations with our accounting staff regarding financial and tax management, and accounting technology for your business.

Monthly Service Plan

Monthly bookkeeping service
Payroll service
Quarterly and year-end payroll tax preparation including W-2, 1099-Misc, 941, 940, and 944.
Sales or gross receipts tax preparation (up to one state)
Quarterly estimated tax preparation
Monthly and year-end financial reports (Trial Balance, Income Statement, Balance Sheet, Budgets)
Prepare your year-end business income tax return (federal and one state)
Consultations with our accounting staff regarding financial and tax management, and accounting technology for your business.

Quarterly Service Plan

Quarterly bookkeeping service
Payroll service
Quarterly and year-end payroll tax preparation including W-2, 1099-Misc, 941, 940, and 944.
Sales or gross receipts tax preparation (up to one state)
Quarterly estimated tax preparation
Quarterly and year-end financial reports (Trial Balance, Income Statement, Balance Sheet, Budget Reports)
Prepare your year-end business income tax return (federal and one state)
Consultations with our accounting staff regarding financial and tax management, and accounting technology for your business.

Annual Service Plan

Year-end bookkeeping service
Payroll service
Year-end payroll tax return preparation including W-2, 1099-Misc, 941, 940, and 944.
Year-end payroll reports including W-2, 1099-Misc, 940 tax returns
Year-end sales or gross receipts tax return preparation (up to one state)
Year-end financial reports (Trial Balance, Income Statement, Balance Sheet, Budgets)
Business income tax preparation (federal and one state)
Consultations with our accounting staff regarding financial and tax management, and accounting technology for your business.

The following restrictions apply to all service plans

You must be an active client on the "tax period ending date" to receive tax preparation service for that report period. For example, (assuming your company has a December 31 year end), if you stopped being a client on September 30, you would not receive December 31, or year-end tax preparation services including yearly reports for the period ending December 31st. In addition, special rates apply (on a case-by-case basis) to clients who join the service in the middle or close to the end of the year.

Staff license, accreditations and professional memberships

Certified Public Accountant: Delaware State Board of Accountancy

Licensed Public Accountant: Delaware State Board of Accountancy

Accredited Business Accountant: Accreditation Council for Accountancy and Taxation

Accredited Tax Adviser: Accreditation Council for Accountancy and Taxation

Accredited Tax Preparer: Accreditation Council for Accountancy and Taxation

Memberships:

American Institute of Certified Public Accountants

National Society of Accountants

Delaware Association of Public Accountants

Accounting, Financial and Tax Professionals of New Jersey

National Association of Tax Professionals

American Institute of Professional Bookkeepers

Highland Park-New Jersey: Chamber of Commerce

New Castle County-Delaware: Chamber of Commerce

Business Network International

Privacy Notice

Richard Goodman Associates has always protected your right to privacy. Like all providers of financial services, we are now required by law to inform our clients of our policies regarding privacy of client information.

Types of Nonpublic Personal Information We Collect

We collect nonpublic personal information that is provided to us by you or obtained by us with your authorization.

Parties to Whom We Disclose Information

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, and in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

Protecting the Confidentiality and Security of Current and Former Clients' Information

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards. Please call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

Richard Goodman Associates, P.A.

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Customer Service

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