



# THE 3-MINUTE CLIENT CASE STUDY

## We Can Achieve Financial Breakthroughs Like This For YOU Too

Below is a typical example of the results we achieve for our small business clients. While individual circumstances differ, our approach is to ensure EVERY client improves results across all the financial elements of their business and in particular cash flow, profit and tax. We'd love to help you achieve improvements like this too...

### CLIENT DETAILS:

- INDUSTRY: Healthcare Service Provider
- BUSINESS NAME: Advancing Together
- CLIENT NAME: Cindy Arteaga
- CLIENT SINCE: 2016

### KEY CHALLENGES:

- She was not in tax compliance with the IRS
- Lacked a reliable and accurate accounting process
- Lacked reliable and accurate financial statements
- Did not have a relationship with a business and tax advisor
- Lacked proper understanding of tax and payroll reporting and regulations.
- Complained she was paying too much in federal taxes
- She did not have a tax plan or a retirement plan

## **SUMMARY OF RESULTS:**

- First, we got her and her husband in full tax compliance with the IRS.
- We scheduled regular quarterly meetings with Mrs. Arteaga in addition to the other annual scheduled meetings.
- We changed the business filing requirement from being a Schedule C filer to filing as a S-Corp filer.
- We gather all the relevant information and provided her reliable financial statements.
- We prepared an acceptable tax plan to dramatically reduce her annual federal taxes.
- Due to the change in filing method and the implementation of several tax strategies that we continue to use to this day her tax savings over the past 7 years is over \$125,000.

## **WHAT THE CLIENT SAID:**

“My youngest he's 16 years I have not received a refund in over 16 years I've been with Mr. Torres for the past three years he is phenomenal. When I say phenomenal I mean I went from paying between two hundred thousand or thirty thousand to two hundred thousand down to receiving a refund. Where can you get that? Nowhere else but with Mr. Torres. You want the ins and outs about how to get everything done, go with him, he is definitely your man.”

**Cindy Arteaga, Owner, Advancing Together**

# **The ‘Profit & Business Improvement System’ Is The Key To Success**

We are a new breed of accountants. As you'd expect, we do all the usual accounting stuff, but any decent accountant can do that. It's WHAT we do with the numbers and your specific situation that sets us apart.

Our ground-breaking ‘Profit & Business Improvement System’ enables us to uncover opportunities and solve any financial challenge you may have now or in the future.

Think of us as your in-house expert financial team without the cost or hassle of recruiting top accounting talent!

In fact, as standard every client gets the following as part of the '**Profit & Business Improvement System**'...



In addition to everything above, the '**Profit & Business Improvement System**' ALSO includes the following benefits...

- Fixed fees
- Affordable monthly payments
- No long-term commitment, cancel anytime

Furthermore, we uniquely help you sell more of your products or services, with **FREE** and exclusive annual membership of the **Conversion Academy**...



We invest a significant 5-figure sum every year so our business clients can access one of the world's best and most exclusive membership programs, focussed on helping business owners, sales professionals and entrepreneurs sell more products and services.

This is normally an invitation only program priced at **\$4,000 a year per person**. If you become a client, we will give you an exclusive **FREE Annual Gold Pass**. You'll love being part of this vibrant community and you'll see your sales and profits soar when you apply the proven tactics and strategies the Academy teaches!



Hopefully this demonstrates to you our commitment to genuinely help you build a financially sound and highly successful business.

Why not see if the '**Profit & Business Improvement System**' is a good fit for you? Plus, when we meet, we'll be able to create a tailored quote to deliver everything you need. To arrange your FREE no-obligation meeting simply call us at:

**361-360-4720**

We look forward to meeting you.

***Raul Torres, CPA***

P.S. If you need advice right now, just call us at **361-360-4720** and speak to one of our accounting experts. Thank you.

P.P.S. If you're not quite ready yet, you'll find our highly acclaimed book really useful. Titled '**The Entrepreneur's Roadmap to Success and Growth**', the book gives you the step-by-step system to grow a financially sound and long-lasting business...

For a limited time we are offering the digital version of the book for **FREE**. Simply click on the book image below and you'll go straight to the book...

