

## MENU OF SERVICES

**Comprehensive Financial Planning** - As a Certified Financial Planner™ and as a complement to the investment management services we also provide, comprehensive financial planning can be an invaluable tool to help you pursue your financial goals. We have completed many of these plans for our best clients and found that in all cases, it was a great learning process that helped exposed areas of vulnerability and highlight solutions to address those vulnerabilities. **Failure to Plan is A Plan to Fail.**

**Investment Management Services** – Douglas Stephenson enjoyed providing investment management services to hundreds of clients both large and small since 1999. We have programs for beginning savers, retirement and college savers, lifetime retirement income programs for retiree's and alternatives to CD's. **We have a plan for nearly everyone.**

**Accounting and Business Planning Services** - As a full service CPA Firm we can handle almost any business type and structure from small mom & pop business to medium size Corporations and LLC's. However, our emphasis is always on the individuals who own and run these businesses. We are focused on providing accurate timely accounting information, tax compliance services and long-term planning services to make sure at the end of the road; you end up with a dignified retirement. **Without A Plan and a Map, you would take a miracle to reach your destination.**

**Virtual Controllership Services** Offers selected clients with our highest level of service. We have introduced for businesses who need accounting and management support without the overhead of additional personnel.

**QuickBooks ProAdvisor Services** - As QuickBooks Proadvisors, we can set up, train and monitor your use of QuickBooks. We exclusively use QuickBooks and support many businesses of all types. Virtual Controller Services are available to selected clients.

**Income Tax Preparation** – Review the attached 11 Reasons to Trust Stephenson Accounting with Your 2015 Income Tax Return Preparation.

**Financial Vulnerabilities Analysis** - For qualified candidates, we will follow up your tax appointment with recommendations of things to do to improve your current personal financial planning situation. We will then follow up with you throughout the year to assist in your implementation and monitor your progress of these suggestions.

*As always, clients with pressing financial planning issues or current investment programs with me will have first priority for my time. To make this possible, tax only appointments may be directed to my experienced tax preparation staff.*

### **My Goal**

I'm working hard to help my clients properly plan and secure their futures. I want to work with clients who also take their financial planning responsibilities seriously. It's unacceptable to me that any client of mine could retire poor or leave their family unprotected if something should happen to them, especially if I never asked them the important questions and offered them solutions.

Sincerely,

*Douglas P. Stephenson CPA CFP®*

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