

**At John Davis & Associates,
CPAs we have saved our clients
thousands by:**

- Creating a solution to a client's \$350,000 expected income tax liability by suggesting appropriate retirement plan options. **Savings exceeded \$150,000.**
- Resolving Client/IRS conflict by amending tax returns; educating IRS agent in the process so that a creative solution would be accepted. **Saved the client \$35,000.**
- Advised business client regarding accelerated depreciation for building improvements resulting in **present value savings of over \$100,000.**
- Reviewed and changed entity type to a corporation leading to an annual reduced tax liability. **Saved the client \$45,000 a year into perpetuity.**



John Davis & Associates
CERTIFIED PUBLIC ACCOUNTANTS, PLC

**2ND
OPINION
PROGRAM**

600 Blair Park Road Suite 280
Williston, VT 05495
(802) 878-1963 www.jda-cpa.com

Exceeding Expectations since 1990



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YES, send me more information!

Fill in the information below. One of our associates will call you to schedule your confidential consultation. Or, if you prefer, e-mail us at admin@jda-cpa.com

Name _____
Company _____
Type of Business _____
Address _____
Phone _____

Please send me a Firm Information Package for my review.

(tear here to mail)

2ND OPINION PROGRAM

Perhaps you file your own taxes and cross your fingers that the IRS won't come calling. Or perhaps your accountant leaves you in the dark. It could be you just need to know your options. In today's economy, the margin of success turns on the smallest details. You don't have to be a financial expert, but you should be getting good answers to your financial questions.

At John Davis & Associates, our **Second Opinion** program is an opportunity to get a new perspective. One that's been formed through years of experience and a creative mind-set. As part of a **confidential consultation**, we review your current tax return & internal records and draw your attention to areas that you may want to think about. There is a standard \$250 charge for this service with an honest "no pressure" approach to change your current relationships. You have nothing to lose, provided that you can spare some time to meet with us.

Specific areas we can help you address include:

- ◆ Tax reduction and deferral techniques
- ◆ Payroll, pension and employee benefits
- ◆ Choice of entity
- ◆ More profitably manage your business
- ◆ Succession Planning
- ◆ Compensation Plans

We are acknowledged experts in areas such as taxes, financial planning, pensions, business valuation and entrepreneur support. Our web site at www.jda-cpa.com is a great place to find out more about us and the services we can offer you.

A fresh perspective is only a phone call away. Call us at **(802) 878-1963** and ask for the **Second Opinion** program. Alternatively, you can complete the card and fax it to us at **(802) 878-7197** or mail it back to us. Or, send an e-mail to admin@jda-cpa.com. We would be delighted to hear from you.



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