

Accounting Services

Accounting and Bookkeeping
Compiled and Reviewed Financial Statements
Budgeting and Forecasting
Payroll and 1099 Reporting
Quickbooks Consulting
Quickbooks Training

Tax Services

Individual Income Tax Preparation
Business Income Tax Preparation
Tax Projections and Planning
Sales and Use Tax Compliance
Payroll Tax Compliance
Entity Planning

Financial Management Services

Cash Flow Management
Debt Management and Obtaining Financing
Goal Setting and Benchmarking
Trend and Ratio Analysis
Pricing and Cost Control
Key Metrics
Internal Controls
Controller/CFO Projects

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Your time is valuable—and your business, financial, and tax matters are important to you. You certainly would not trust them to just anyone. That is why at Essential Financial Management we work hard to provide prompt and professional accounting and tax services to all of our clients. We understand the value of trust and seek to earn it with each engagement. We offer a full menu of services to help with your specific needs.



Financial Statement Reporting

EFM has skilled, professional accountants on staff to handle your accounting and financial reporting needs. Whether you need professionally compiled or reviewed financial statements for your lender or you simply need financial statements for management and tax compliance purposes, EFM has a high-quality, low-cost solution for you. Rest assured that our experienced and detail-oriented accountants will prepare professional financial reports that are compliant with today's accounting standards.



Individual and Business Tax Compliance

Savvy business owners seek out the leadership and guidance of a skilled CPA to navigate through the complex and ever-changing tax environment. At EFM we work diligently to stay current with tax law changes and we look to take advantage of all opportunities available to minimize your tax liability. Whether it's individual taxes or business, payroll, property, or sales and use taxes you can be confident that we have the expertise and experience to keep you and your business compliant while minimizing your tax bill.



Financial Management—Beyond the Income Statement

At EFM, we help our clients look beyond the limited information that financial statements provide and focus on tools that help more effectively manage the business. We can develop highly effective accounting systems, prepare and maintain annual budgets and monthly/quarterly forecasts, create benchmarking models, and analyze trends and ratios. We can use these and other valuable tools to proactively monitor and manage the financial health of your business. By digging deeper into the numbers we help identify opportunities and threats that may be lurking under the radar. We encourage our clients to take advantage of our financial expertise and let us help your business be all it can be.

Complete Accounting Services from a Trusted Partner

We recognize that your financial and accounting needs are unique to your business, so we pride ourselves on crafting custom solutions to meet those needs efficiently and cost-effectively. Whether you are simply looking for year-end tax work or you require full charge bookkeeping services including payroll and financial analysis (or something in between), we will tailor a program to accommodate you.

As your CPA and trusted financial advisors, we know that the services we perform and the financial leadership we provide can have a direct impact on the success of your business. We do not take that responsibility lightly, and as such we are committed to helping maximize the long-term value of your business.

Call us today and allow us to be the accounting, financial, and tax partner that you have been looking for.

“David and Mandy have managed our accounting and financial responsibilities for over 10 years. Their understanding of financial and tax matters is a huge asset to our company, and there is no one I trust more to get the job done right, with the efficiency and accuracy that we need to manage our business. With them, I know that the financial side of the business is handled and I can focus all of my time on operational matters.”

Jason Gordon, Partner/Owner—Sheffield Homes and Sheffield Homes Finished Basements and More, LLC