Bonus Tax Pros
Accounting | Bookkeeping

With Bonus Tax Pros, you get professional, accurate and timely bookkeeping services committed to giving you best practices GAAP*** and IRS**** compliant record keeping. We will not sell you services that you do not need. We keep your records in a secured electronic environment with proper back up using QuickBooks or your preferred software. Our service is professional, responsive, and committed to help you prosper in what you do. Working with us will not tie you up long term. If for some reason you are not happy with our services, you may cancel at any time with just 30 days notice. Since your records belong to you, including the files we created that were paid for, these will all be turned over to you with no need of demand.

We are local to Southern California and are available to meet you in person, when required. However, if you are located outside of Southern California, you can still be our client because we can exchange document through our data portal at https://bonustaxpros.securefilepro.com.

***Generally Accepted Accounting Principles as defined by the FASB

****The Internal Revenue Service prescribes a standard of acceptable supporting documents to support income and expense transactions for businesses. Visit this link to know more: https://www.irs.gov/businesses/small-businesses-self-employed/what-kind-of-records-should-i-keep

Services we will do for you (You may exclude any that you prefer to do yourself.):

- Maintain and update the Chart of Accounts/General Ledger
- Data entry of income, expenses and disbursements
- Bank and Credit Card Reconciliation
- Accounts Receivable – data entry of invoices, record and post customer payments, aging analysis
- Accounts Payable – data entry of unpaid bills received
- Cash Disbursement – data entry of checks disbursed
- Tract Fixed Assets and maintain depreciation and amortization schedules
- Journal Entries
- Month-end close
- Financial reports

First time clients

All packages will require an engagement document and payment of a one-time fee to review and set-up your unique chart of accounts, report design and documents organization. Client staff will be trained on how to organize and forward documents into the shared document portal.

What to expect

Engaging us is easy and we designed our system to minimize the burden for you. Here is what you can expect from us:

1. We will set-up an initial meeting to assess your needs. During this needs assessment meeting, we will ask you the nature of the business, the volume and complexity of the data, the desired scope of the engagement, the reporting required, the timetable for reporting and other factors. From there, we will determine the set-up required, the scope of service and the approach we will take to meet the said needs.

2. We will submit an engagement letter with the scope of the service, terms and conditions and payment terms.

3. Once the said letter is accepted and the initial payment is made, we will meet and train your staff on how to upload and download your documents that we exchange.

4. We will ask questions and call you or your staff a few times in the beginning as we familiarize with the account. These calls will be limited as we become familiar with your operations.

5. Upon completion of our work for the subject month, we will send you the agreed reports. This will take place no later than 15 business days from the time you sent your complete documents.

6. We expect you to call us to discuss any questions you may have after we send the reports.

7. We value your input and would like to be of help to you. So, we welcome your calls. Do not hesitate to call or send an email as you need to.