

# CAPABILITY STATEMENT

8(a)/BEP/MBE (NMSDC) Business

## **Barbee Tax Consulting, LLC**

## **INQUIRY FACTS**

#### **CUSTOMER REVIEWS**

"Barbee Tax provided VERY good and helpful information. I wish we would have contacted them sooner. Their consulting advice is going to save us thousands of dollars in taxes!" - Partner, Marketing Firm

"We had 5 years of unfiled returns. We filed the returns and subsequently received a \$67,000 penalty. Barbee Tax appealed the penalties using timelines and negotiation. Then the unthinkable happened, the \$67,000 penalty was abated. They earned a client for life!"—Partner, Real Estate Firm

"I wholeheartedly believe Barbee Tax has the unique accounting experience, exposure and education you are seeking in your next CPA. They were courteous and cognizant of the urgency to file my taxes in time. Their commitment to making sure I got my due diligence was reassuring."—
Owner, Ad Consulting Firm

## **BACKGROUND**

- ✓ Over a decade of experience
- ✓ Quickbooks Certified ProAdvisor
- ✓ Former Big 4
   Accounting Firm
   (Anderson & PwC)
- ✓ Rated a 5-star CPA by Intuit
- ✓ Master's in Taxation from Top 5 school
- ✓ Three articles published by the AICPA (American Institute of Certified Public Accountants)
- ✓ 100% success with tax notices

## WWW.BARBEETAX.COM

## ONE SOLUTION AT A TIME!

Barbee Tax Consulting, LLC provides accounting, tax, and non-traditional consulting services in the United States. Our CPA's elucidate federal and state tax laws by focusing on "One solution at a time." We identify potential solutions and alleviate clients' concerns. Barbee Tax is a forward thinking company that has Big 4 expertise and experience without the Big 4 hourly rates. (The Big 4 accounting firms are PricewaterhouseCoopers, KPMG, Ernst & Young, and Deloitte). We are one of the only firms that provide Affordable Care Act ("ACA") compliance at a fraction of the cost.

The foundation of the company began by providing a solution to businesses looking to subcontract their tax functions. Its humble beginnings have led Barbee Tax to quadruple in revenue and expanding its offices. Contact us to find the right solution for your enterprise.

#### ACCOUNTING

- Quickbooks online mobility
- Reconcile bank & credit card transactions
- Job costing analysis
- S.W.O.T analysis
- Monthly management reports (i.e; P &L and Balance Sheet, etc.)
- Payroll assistance
- And much more!

#### TAX CONSULTING

Researching, analyzing and defending a variety of tax issues, such as:

- Audits and notices
- Multi-state issues
- Credit and incentives
- Officer Compensation
- Nexus Compliance
- Voluntary Disclosure
- Settlements
- ➤ And much more!

## **ACA CONSULTING**

- ➤ 1094/1095-B or C Compliance
- > IRS Audits & Notices
- Full-time Equivalent Tracking
- Variable-Hour Tracking
- Employee Notice Delivery (Paper & Electronic)
- Educational Training
- Internal Examination
- > Inquiry Assistance
- ➤ And much more!

#### **CERTIFICATIONS**

CPA – Certified Public Accountant SBA – 8(a) Small Business Certification BEP – IL Business Enterprise Program MBE – Minority Supplier Development Council

SDB - Small Disadvantaged Business

## CODES

CAGE – 6ZUM8 DUNS – 079153663 NAICS

- 541213 Tax Preparation
- 541211 Certified Accountant
- 541219 Other Accounting
- 541611 General Management
- 541618 Temporary Help

### **CONTACT INFORMATION**

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