



The Lee Accountancy Group, Inc.  
is a financial services firm.  
It is from this background and  
perspective that we can help clients  
establish business plans to  
accomplish their tax, accounting  
and financial objectives.

WORKING TO MEET  
ALL YOUR  
Accounting and  
Financial Needs

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**The Lee Accountancy Group, Inc.**

## Among the products and services we make available:

### Tax Preparation

We provide clients with audited, reviewed and compiled financial statements, as well as agreed upon procedure reports, financial projections and forecasts.

We service a wide range of clients, from small to large clients.

### Small Business Services

We assist our small business clients with business and corporate tax returns, preparation of financial statements, and monthly write-up services. We also provide advice on business start-up procedures.

### Tax Planning Services

Our tax planning services encompass corporate, partnership, fiduciary/estate, individual taxation needs, and fringe benefit plans, along with tax issues related to choice of legal entity planning.

### Business Consulting Services

- Business valuations
- Forecasts and projections
- Business mergers and acquisitions
- Business planning
- Benchmarking/Industry comparisons

### Retirement Plan Services

Through our relationship with other firms, we provide clients with full retirement planning services for qualified and non-qualified retirement plans. We also help clients look at the eventual distribution of their retirement assets.

### Financial and Investment Services

Our clients have access to financial, investment and life insurance products and services. We strive to protect our clients' well being and live up to their expectations by putting their needs and interests first and selecting quality products. Whether it is retirement planning, estate planning strategies or business succession planning, we are here to build and maintain long-term relationships based on integrity and responsiveness.

We recognize the commitment and responsibility we undertake when we provide clients with access to investment services. By listening closely to their objectives, we strive to deliver high quality investment products that correspond to their risk tolerance and investment horizon.

### Life Insurance

Risk can be assumed, ignored, or transferred to a risk bearer. Life insurance is about managing risk. By asking questions and understanding their concerns and needs, we help clients select appropriate products and services to help achieve their personal, business and financial objectives.

### Tax Resolution and Representation

We can help settle wage garnishments, reduce delinquent tax, bank levies, audits, and more. We carefully review a client's case and develop a thorough plan that will help resolve tax problems quickly and efficiently. In addition, we can provide advice and representation before the Internal Revenue Service and the California Franchise Tax Board.

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### The Lee Accountancy Group, Inc.

Offering clients a wide range of tax, accounting, and financial services, including:

- Accounting & Bookkeeping
- Tax Planning
- Management Consulting
- Estate & Trust Tax
- Small Business Services
- Retirement Planning Strategies
- Estate Planning Strategies
- Business Continuation Strategies
- Benchmarking/Industry Comparisons
- Tax Representation