

Specialized tax and accounting services for insurance agents.

As your business grows, Savoy ensures you pay the minimum tax, tracks and analyzes your expense and income data, and helps deliver 360 degree, year-round business profit growth. Savoy clients typically make 10% more profit than their peers. Our business owner service package includes:



Pay Less Tax

Our tax team helps find deductions you don't know about and expenses you forgot about to lower your tax liability. Just three easy steps for tax preparation.



Quarterly Tax Preparation

Based on actual income, Savoy prepares online quarterly tax estimates for independent contractors.



Profit Planning

Individualized coaching on how your financial success can help you achieve your personal goals.



Unlimited Business Consulting

A designated business consultant will reach out to you regularly and provide strategic tax and business advice. They will build a profit plan, or a budget, with you based on your business and personal financials to determine your break-even point. They will also benchmark your business performance against your peers to determine areas of excellence and areas for improvement.



Bookkeeping Done for You

We will do all your bookkeeping for you. We will also provide Profit & Loss statements featuring income and expenses in a monthly and year-to-date format available on your own web page.



Benchmarking Your Performance

Savoy compares your business to other independent contractors and highlights where you excel and where you need to apply change.



Secure Online Portal

View your P&L Statements, profit plan, receipts, and tax estimates from any device for financials at your fingertips. Savoy state of the art technology customizes a personal web page for your business.

Insurance agents need the peace of mind that their books are accurate and up-to-date. Savoy takes care of your financial recordkeeping so you can spend your time serving your clients.

Savoy will:

- Provide you with a bookkeeper who's an expert in insurance services and will setup your industry-specific general ledger
- Help you track and understand your cost-per-client
- Get you ready for tax season by tracking your expenses, including miles driven and home office costs

- Help you understand your cash flow through regular bank reconciliation
- Provide you regular reports that highlight your business's performance
- Use cloud based financial software and other technology that can help you run your business more efficiently

Call today to get started with our Tax & Accounting Services

(602) 841-7840

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