

## **SERVICES PROVIDED**

### **TAX**

PLANNING & STRATEGIES

AUDIT REPRESENTATION

PREPARATION, REVIEWS & ANALYSIS

EDUCATION AND SEMINARS

PROJECTIONS

### **\*INVESTMENTS**

ADVISORY NO-LOAD MANAGED PROGRAMS

401k TO IRA ROLLOVERS

IRA, SEP, SIMPLE PLANS, QUALIFIED PLANS

EXCHANGE TRADED FUNDS

GENERAL SECURITIES

MUTUAL FUNDS & BOND FUNDS

TAX-FREE INVESTMENTS

ANNUITIES & LIFE INCOME RIDERS

### **ACCOUNTING & BOOKKEEPING**

QUICKBOOKS CONSULTING

PAYROLL

BOOKKEEPING

### **Pinnacle Tax & Financial Services, LLC**

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