

**OUR FIRM HAS THE
RESOURCES, EXPERIENCE
AND KNOWLEDGE
to manage your financial needs.**

Lisa K. Taylor, CPA - President

More than 25 years of accounting expertise in small to mid-size business development, accounting solutions and tax strategies for businesses and their owners. Her experience encompasses public accounting focusing on auditing and tax preparation for corporations, partnerships and individuals. She is a former Executive VP, CFO and Chief Investment Officer of a major local corporation. Lisa holds a B.A. degree in business from Lynchburg College.

Jennifer C. Lee, CPA - Executive Vice President

Over 13 years of accounting and auditing expertise with a diverse background that includes banking, construction/development, education, manufacturing and distribution. Jennifer holds a B.S. degree in accounting from Lynchburg College.

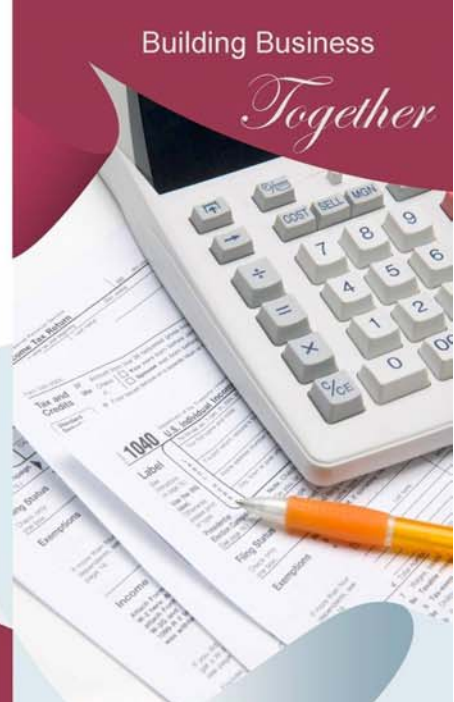
Dianne B. Martin - Vice President

Over 20 years of accounting experience including former Controller for a large non-profit organization. Her expertise includes accounting for investments, real estate, medical, foundations, churches, restaurant and retail establishments.

We believe that the selection of a certified public accounting firm is one of the most important decisions an individual or business can make. We simplify that decision by providing our clients with the vital advice they need to maximize their profitability.

Our commitment to excellence allows us to offer a wide array of accounting, tax and consulting services delivered with a personal and professional touch. We value our role as trusted partners who know our business and respect yours.

If you are looking for a productive relationship with trusted financial experts, The Jefferson CPA Group, Ltd. is the right choice.



Building Business

Together

The Jefferson CPA Group, Ltd.
203 Archway Court
Lynchburg, VA 24502
Phone: 434.316.0218 • Fax: 434.316.0219

— OR —

The Jefferson CPA Group, Ltd.
1220 Main Street, Suite A
Altavista, VA 24517
Phone: 434.309.1216 • Fax: 434.309.1265

Website: www.jeffersoncpas.com
Email: info@jeffersoncpas.com

**Conveniently located in
Lynchburg and Altavista**

**The Jefferson
CPA GROUP, LTD** 
Accounting and Tax Services



**WE PROVIDE THE
TOOLS AND PERSONALIZED
SERVICE to help you make smart
business decisions.**

The Jefferson CPA Group, Ltd. is committed to providing quality accounting and tax services by highly experienced professionals. Our firm offers an accounting practice for both businesses and individuals ranging from personal bookkeeping to complete corporate accounting and tax preparation. The trend today is for businesses to outsource functions that are not directly related to the generation of income and focus on building the business.

The Jefferson CPA Group, Ltd. is a minority owned and operated business. Formed in Lynchburg, Virginia in 2005, the shareholders have over 60 years combined accounting experience ranging from multimillion dollar, multi-state operations to small business and individual tax returns. The personalized attention provided to our clients is a distinct attribute of our firm. The integrity of our owners and the individuals which we employ creates a comfortable working relationship with the client.

The Jefferson CPA Group, Ltd. is a member of the Virginia Board of Accountancy and the Virginia Society of Certified Public Accountants. Our firm is SWaM certified (Certification #668001; Type-WS) and registered with eVA, Virginia's Total e-Procurement Solution.

We value the relationships with our clients.

SERVICES FOR BUSINESSES

- > Corporate Returns
- > Small Business Specialist
- > Fiduciary Returns
- > Cash Flow Analysis
- > Partnership Returns
- > Tax Reports
- > Audits
- > Financial Statements

SERVICES FOR INDIVIDUALS

- > Tax Planning
- > Individual Tax Returns
- > College Planning
- > State Tax Returns
- > Retirement Planning
- > IRS Representation
- > Estate Planning

**Acquisition of Capital
and Cash Flow Analysis**

One of the greatest challenges of a business owner is obtaining financing. With our experience and credibility, we have established relationships with major lenders and will be able to advocate for you. Our firm can also assist with analysis of cash flow as your business progresses, as well as offer strategic business planning and consultation services to obtain an optimal level of success.

**Payroll Processing and
Tax Reporting**

Our all-inclusive payroll services provide filing of tax deposits and related returns. Electronic services such as direct deposit and online tax payments are also available.

**Tax Planning and
Preparation**

Our professionals have extensive experience in this field and can provide planning and preparation for individuals, corporations, partnerships, trusts and estates, and non-profit entities.

**Accounting and
Bookkeeping**

These services include processing of accounts payable/receivable, bank statement reconciliation, maintenance of fixed asset schedules, and preparation of financial statements. These services comprise required adjustments to accurately represent results of operations and financial position of your company and can be provided on a monthly, quarterly, or annual basis.

**New Business
Formation**

Our firm can determine a business structure that best fits your needs by evaluating tax advantages, legal exposure, and ease of operation. With our established network of legal professionals, we can recommend an attorney to meet the specialized needs of our clients. We can assist in the preparation and filing of all required state and local licenses and permits as well as in the selection of accounting software.

QuickBooks Training

Our staff is very knowledgeable on QuickBooks and can assist with the implementation of the software as well as training on all modules.