

BUSINESS FINANCES MADE EASY



SYNERGY

TAX & BUSINESS SOLUTIONS

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Bookkeeping

Payroll Services

Business & Personal Taxes

Virtual CFO Services

Training & Consulting

Business Start-up Support

The background of the slide is a light blue-tinted photograph of a desk. On the left, there is a small white pot containing a succulent plant. In the center, a laptop is open, showing a keyboard with Thai characters. To the right of the laptop, a document is spread out, featuring various hand-drawn business diagrams, charts, and icons. One prominent diagram is a bar chart with four bars of increasing height, labeled with percentages: 20%, 10%, 30%, and 45%. Other elements include a pie chart, a lightbulb, a magnifying glass, a search icon, a calendar showing the number 8, and several arrows indicating flow or direction. The word 'BUSINESS' is written in a circle. The overall scene suggests a professional workspace focused on business analysis and planning.

THE RIGHT COMPANY TO HANDLE THE FINANCIAL NEEDS OF YOUR BUSINESS



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TAX & BUSINESS SOLUTIONS

Introduction

Synergy Tax & Business Solutions specializes in providing comprehensive business services and consulting solutions with a team educated in Business, Accounting, Taxation, Marketing and Communications.

Whether you're looking for backup accounting support, or a full-cycle finance department, we will tailor a plan that meets the precise needs of your growing business.



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About Us

Our Company

Synergy Tax & Business Solutions was founded in 2008. What started as a single person operation quickly expanded into a team that is now 7 people strong and growing. Synergy opened its first office doors in 2014.

Since then, Synergy has expanded into Toronto and Edmonton, with more growth on the horizon.

We at Synergy know that finding the right company to handle your business' financial needs is a choice not to be taken lightly. That's why we offer free consultations to walk through your needs, the scope of your goals, and your budget.

- ✓ **Bookkeeping**
- ✓ **Payroll Services**
- ✓ **Business & Personal Taxes**
- ✓ **Virtual CFO Services**
- ✓ **Training & Consulting**
- ✓ **Business Start-up Support**

ABOUT US

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SARAH QUEALE – Founder & President

Sarah is an entrepreneur, business partner and opportunity-seeker. Having spent years supporting small and medium-sized businesses from a financial management perspective, she has seen the ups-and-downs of the entrepreneurial world.

Sarah was trained in Business and Accounting at Fanshawe College in London, Ontario, and Athabasca University in Alberta and is now completing Ivey Business School's Executive MBA Program. She has a unique, positive outlook on the world, and is always searching for a challenge.



ADRIANA ROMAN
Senior Account Specialist



AMY CIRCELLI
Tax & Account Supervisor



KRISTIN LEFAVE
Bookkeeper & Business
Development Manager



IRENE QUEALE
Account Specialist



NICOLE WATT
Bookkeeper



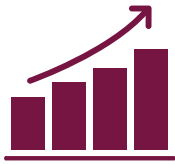
JESSICA JEFFERY
Bookkeeper

OUR TEAM

Our Services

50+ Shared Years of Professional Experience

Accurate bookkeeping and business financial management is the key to lasting success in any business. It is important to keep your financial picture clear and up-to-date. We keep records organized and reporting current for any size business so you can focus on what you do best.



Bookkeeping

We can complete all bookkeeping functions for your business – including tracking your monthly sales and expenses, generating financial statements, completing your government remittances (GST/HST, Payroll taxes, WSIB) and more. Services are offered on-site and off-site.

We also offer a unique way to collaborate to keep your books up-to-date from anywhere! In this digital age, let's keep you informed and your records accessible. Many online collaborative options available.

Training & Support

Don't quite need a professional bookkeeper yet, but not sure where to start? We have a great set of solutions for you. From software installation and new file-set-up, to showing you the best way to track and organize your expenses and receipts, we can come in and in a one, two, or 5-day consulting package, get you up and ready to manage your own books. This is an incredibly cost-effective and easy way to get started or to re-vamp your current method of managing your financial record-keeping, leaving you with long-term tools to make the most of your precious time.



Income Tax Services

Whether you're a student, a salaried employee, or you are self-employed, we will prepare your Canadian Personal Income Tax return to effectively maximize your deductions and minimize taxes payable. Synergy is a certified Electronic Filer with the Canada Revenue Agency. We also specialize in self-employed returns for many proprietors in an array of business categories. Tax time can be stressful enough, digging out all of those receipts and forms – don't go it alone, let us help!

Business Consulting

On-site & virtual training packages for any size of business.

From strategic planning, marketing strategies, or assistance via our Virtual CFO Program, to designing a custom plan to get you organized. Synergy offers unique consulting services – we have a wide range of professional partners in a variety of business-related fields, available to you. Inquire today about a full-service package for your start-up or a growth package to help expand your current operations!



SERVICES



PARTNERSHIP

Our Standards

Partnerships & Support Built to Last

"I opened my business late 2017 carrying only a good work ethic and zero to no knowledge of how a business works, shortly after I had been recommended to Sarah at synergy tax and business solutions. After a quick sit down with Sarah it was a no brainer to hop on board and have her services at my fingertips just a phone call away whenever I needed it. It wasn't easy building a business, but in the construction industry it's key to focus on the day to day, I didn't have time or the abilities to do what Sarah does, and because of that I have managed to build my company from myself to 15 employees since I've signed up with Sarah. Synergy is full of useful tips and tricks to help your business save money, how to safely grow, and most importantly what not to do. Getting sarah and her company in my corner was probably the best business decision I've made thus far, and I'd be completely lost without her services."

- Russel V.

"I've been using Sarah and her team at Synergy for years now and I couldn't be happier. Tax season used to be stressful but Synergy makes it such a smooth and easy process. I've learned so much from them about expenses and writeoffs that I would never had known otherwise. For business and personal taxes, I would recommend no one else but Synergy."

- Rory M.

"It has been such a pleasure to work with Synergy Tax & Business Solutions. We truly value their expertise. They are easy to work with, and are always ready to help. We highly recommend them!"

- Katie A.

Outstanding service! Sarah and her team at Synergy are friendly, make you feel right at home. Their service is complete from start to finish taking care of every detail. They ask the right questions in order to get to know their clients. Feel confident that you will be well taken care of at Synergy!"

- Kim G.

"From business inception, initial start up, through 6 years of business and it's eventual sale, Synergy Tax and Business Solutions was an integral component of my business practices. Synergy reliably prepared all monthly financial reports, government remittances, Year end documentation, audit reports, tax preparation and T4's. The team also provided in depth business analysis, tax saving techniques and business review. Personal and Professional, I recommend Synergy Tax and Business Solutions for all business and personal bookkeeping. The value they added to my business was irreplaceable."

-Lindsay M.



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