



What are your hopes and dreams?
What is your vision for the future? We understand that you want results, peace of mind, and solutions to problems.

We Are in the Transformation Business

We take time to understand our customers' needs and expectations so that we can provide true value. We strive to treat our customers specially.

Our Value Proposition:

We will create extraordinary value through providing excellent service and we will customize our services into fixed price agreements, utilizing change orders and a 100% money-back guarantee.

Allen & Company

No two customers have the same expectations. Therefore, we believe that each one must be treated differently and that our services must be customized to meet his or her needs. Rather than focusing on the technical aspects of what we do, we focus on the benefits our customers receive from our wide range of accounting, taxation, and consulting services.

We take time to ensure that we are a good solution for our customers. If you would like to apply for membership in our firm, please visit our internet site and complete a New Business Customer Application.

100% Money-back Guarantee

Our work is guaranteed to the complete satisfaction of the customer. If the customer is not completely happy with the service performed, we will, at the option of the customer, either refund the price or accept a portion of the original price that reflects the customer's level of satisfaction.

Additional Information

Please visit our internet site to see sample products, receive preliminary fee estimates for certain services, see information needed to receive final fee quotes, sign up for our monthly newsletter, and to learn more about realizing your dreams.

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Allen & Company, PC

Accounting, Taxation,
and Consulting Services

Achieve your goals.

Have more financial freedom.

Enjoy your prosperity.

Realize Your Dreams



Individual Advisory

We live in a complex, fast-paced world with rapidly changing social, economic, political, and technological environments. Developing personal strategies to improve our lifestyles becomes increasingly difficult. Our goal is to help you begin taking charge of your personal finances so that you can achieve your goals and have more freedom.

Financial Performance Review - An easy-to-understand report that evaluates the personal financial health of an individual and provides insights into the areas of income, expenses, cash flow, and wealth accumulation and provides ideas to help people define and reach their personal financial goals.



Taxation

Income Tax Planning - Many people pay too much income tax, because they do not know how to reduce their income tax. The goal of income tax planning is to minimize tax liabilities without sacrificing other financial goals.

Income tax planning services include assessing the current income tax situation and the potential impact of both current tax legislation and proposed legislation and developing a strategy to legally avoid or defer as much tax as possible. We communicate in plain language to our individual customers so that they can understand their current tax situation and our proposed strategy for helping them reduce their taxes.

Income Tax Return Preparation - Today's income tax laws are so complicated that unless your affairs are extremely simple, chances are that you will benefit from assistance from a tax professional. It is too easy to overlook deductions and credits that you are entitled to if you only prepare one income tax return each year. Even the use of computer software is no substitute for the assistance from a seasoned tax preparer. More importantly, you will have someone to answer your questions during the rest of the year.

Other Tax Return Preparation - Includes preparation of United States estate tax returns, United States gift tax returns, and property tax returns.

Accounting

Financial institutions often require their individual customers to provide personal financial statements to help them assess their financial situation.

Personal Financial Statement Compilations - Present financial information in the form of financial statements for the independent analysis by third parties. Compiling a personal financial statement is often the first step in personal financial planning.

Other Services

Personal financial planning and estate planning services are provided by affiliates of Allen & Company.

Membership

We like to think of our firm as a club where members have exclusive access to exceptional benefits. Benefits of membership include:

- Access to an outstanding network of people who help us satisfy the needs and wants of our customers
- Access to our business customer alliances to benefit from their products and services
- Access to monthly newsletters
- Access to "Lunch & Learns" to discuss tax or financial improvement topics
- Access to open houses to meet firm affiliates and customers and to provide information to us about your wants, needs, and service quality