



# ***Service Postings***

*Headlines of professional services offered by  
JPT Financial and shared to Social Media*

 **JPT FINANCIAL SOLUTIONS, INC.**  
*Eldercare • Advisory • Tax • Accounting*

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- ✓ As key internal consultants at JPT Financial Solutions, we serve as a change agent, coach, or educator within your business structure.
- ✓ As key internal consultants at JPT Financial Solutions, we implement business solutions for organizational effectiveness and process improvement.
- ✓ At JPT Financial Solutions, we are available for short-term accounting consultant projects.
- ✓ At JPT Financial Solutions, we're available to prepare your Personal or Business tax returns.
- ✓ At JPT Financial Solutions, we provide accounting services to families dealing with financial matters for ill family members or deceased loved ones.
- ✓ Check out our accounting control consulting services at JPT Financial Solutions for business and consumer clients.
- ✓ At JPT Financial Solutions, we review and analyze cash flow and budgets.
- ✓ At JPT Financial Solutions, we review and analyze operating and overhead expenses.
- ✓ At JPT Financial Solutions, we can help you get your personal finances in order. Give us a call. We are looking for new clients and referrals.

- ✓ At JPT Financial Solutions, we are a Problem Solver and Solution Provider.
- ✓ At JPT Financial Solutions, we're available for accounting contract projects – Personal or Business Financials
- ✓ At JPT Financial Solutions, we organize your financial affairs!
- ✓ At JPT Financial Solutions, we are financial process troubleshooters who streamline, investigate and rectify reporting issues. Give us a try!
- ✓ At JPT Financial Solutions, we're looking for Accounting Consulting Projects. Check out what we do! Business or Personal...
- ✓ At JPT Financial Solutions, we assist in the accounting and financial management of estates.
- ✓ At JPT Financial Solutions, we're experienced in the financial management of elder relatives.
- ✓ Is your Financial Process out of control? At JPT Financial Solutions we offer Coordination and Troubleshooting.
- ✓ At JPT Financial Solutions we handle critical business issues.
- ✓ Financial Weakness? At JPT Financial Solutions we provide Internal Control Standards Development.
- ✓ At JPT Financial Solutions we provide Strategic Planning and Analysis.
- ✓ Need help? At JPT Financial Solutions we offer Business Consultation.
- ✓ At JPT Financial Solutions we offer complete tax preparation services for individuals and businesses.
- ✓ At JPT Financial Solutions we're looking for Corporate Financial Control accounting projects.
- ✓ At JPT Financial Solutions we are accounting control specialists with prior financial planning and analysis experience at Citigroup.

- ✓ If your tax refund was too high, we at JPT Financial Solutions can help re-budget your money to use it more wisely throughout the year.
- ✓ At JPT Financial Solutions we enjoy managing cash flow. Let us help you organize your financials.
- ✓ At JPT Financial Solutions we provide an analytical consultation of your business financial needs.
- ✓ At JPT Financial Solutions we have extensive experience dealing with managing finances for elders. Give us a call or email.
- ✓ At JPT Financial Solutions we have a network of other finance and business professionals who work with us to serve our clients.
- ✓ At JPT Financial Solutions we provide the complete financial care and oversight of elderly clients.
- ✓ At JPT Financial Solutions we provide consulting on the financial planning and tax needs of the elderly person.
- ✓ At JPT Financial Solutions we provide wise counsel and planning on all financial matters.
- ✓ At JPT Financial Solutions we can help anyone with an elderly parent or relative they care for or worry about to pay bills and track finances.
- ✓ As a provider of CPA Eldercare Services, we at JPT Financial Solutions can handle family emotional issues surrounding clients with dementia.
- ✓ When your loved one is no longer entirely independent or simply needs extra help, our CPA Eldercare Services at JPT Financial Solutions can assist.
- ✓ At JPT Financial Solutions we specialize in tax preparation, bill payment, and managing personal finances for older clients including home visits.
- ✓ At JPT Financial Solutions we are a proficient financial process troubleshooter and problem solver.
- ✓ At JPT Financial Solutions we deliver analytical consultation services to help clients better organize, coordinate and control their financial performance.

- ✓ At JPT Financial Solutions we assist clients to develop measures of internal control to mitigate risk and improve performance.
- ✓ At JPT Financial Solutions we evaluate inadequacies in the financial reporting process to uncover weaknesses.
- ✓ At JPT Financial Solutions we strengthen, streamline and upgrade reporting processes and procedures.
- ✓ At JPT Financial Solutions we deliver candid recommendations for improvements in the financial process.
- ✓ At JPT Financial Solutions we implement consummate logic and organizational skills to design, devise, set-up and coordinate new reporting mechanisms.
- ✓ At JPT Financial Solutions we develop, coordinate and implement all phases of business management reporting integration.
- ✓ At JPT Financial Solutions we create, organize, direct and manage reporting hierarchy structures and internal business organization levels.
- ✓ At JPT Financial Solutions we establish, oversee and enforce internal control measures over financial reporting to mitigate risk and improve performance.
- ✓ At JPT Financial Solutions we implement quality control checks and balances in the financial process to maintain integrity and accuracy.
- ✓ At JPT Financial Solutions we author internal reporting reference documentation, policies and reporting standards.
- ✓ At JPT Financial Solutions we initiate and create reporting tools and develop disbursement and revenue generating guidelines.
- ✓ At JPT Financial Solutions we orchestrate and circulate project and spending proposals.
- ✓ At JPT Financial Solutions we formulate data analysis, control standards, and outline plans to implement project goals and strategies.

- ✓ At JPT Financial Solutions we develop short term and long term strategic plan to determine an organization's future costs.
- ✓ At JPT Financial Solutions we set direction and make decisions on allocating resources of client to pursue their strategy.
- ✓ At JPT Financial Solutions we establish client vision statement to define the way an organization or enterprise will look in the future.
- ✓ At JPT Financial Solutions we guide business leaders to communicate the vision statement within their organization.
- ✓ At JPT Financial Solutions we prepare analysis of the current business results, marketing strategy, plans, policies, goals, objectives, tactics and actions.
- ✓ At JPT Financial Solutions we prepare and develop analysis of operating results and tracking mechanisms to confirm that spending is in line with overall targets and goals.
- ✓ At JPT Financial Solutions we devise and recommend strategic business solutions to our client base.
- ✓ At JPT Financial Solutions we advise on pricing, credit policies and cash flow concerns.
- ✓ At JPT Financial Solutions we provide guidance on internal cost controls.
- ✓ At JPT Financial Solutions we assist business clients with loan, purchase and other financial applications.
- ✓ At JPT Financial Solutions we deliver overall guidance for start-up businesses.
- ✓ At JPT Financial Solutions we provide overall financial guidance and establish an intimate knowledge of the client.
- ✓ At JPT Financial Solutions we recommend a network of professional referrals, and serve as a financial advisory.
- ✓ At JPT Financial Solutions we develop a financial plan and budget for individual clients with goals and milestones.
- ✓ At JPT Financial Solutions we identify and track client financial accounts and records.

- ✓ At JPT Financial Solutions we prepare periodic review and analysis of the client financial activity and forecast summary.
- ✓ At JPT Financial Solutions we manage the client monthly cash disbursements and income receipts.
- ✓ At JPT Financial Solutions we provide the complete financial care and oversight of elderly clients.
- ✓ At JPT Financial Solutions we provide an elderly client with assistance for their daily financial affairs, business and related duties.
- ✓ At JPT Financial Solutions we will collect all monthly bills and ascertain their validity and accuracy for elder clients.
- ✓ At JPT Financial Solutions we handle day-to-day financial transactions for elderly clients.
- ✓ At JPT Financial Solutions we organize and review personal, financial, and legal documents to determine what a client needs to address.
- ✓ For elderly clients we at JPT Financial Solutions will review receipts for medical expenses, prepare necessary reimbursements and follow up on payments.
- ✓ At JPT Financial Solutions we provide assistance with check writing, online banking and checkbook balancing.
- ✓ At JPT Financial Solutions we make payments for elderly clients in the form of written checks or electronic payments.
- ✓ At JPT Financial Solutions elder client retirement account distributions will be planned and safeguarded against improper disbursements.
- ✓ At JPT Financial Solutions a review of elder client income to be received and deposited will be verified on a regular basis.
- ✓ At JPT Financial Solutions we monitor and track client's total financial portfolio including cash, investments and real estate.

- ✓ At JPT Financial Solutions we prepare Federal and State personal and business related tax returns and related information return filings.
- ✓ At JPT Financial Solutions we handle Estimated Tax Analysis and Planning.
- ✓ At JPT Financial Solutions we prepare Estate Tax Returns.
- ✓ At JPT Financial Solutions we prepare Gift Tax Returns.
- ✓ At JPT Financial Solutions we prepare Quarterly and Year-end Payroll Tax Returns.
- ✓ At JPT Financial Solutions we prepare 1099, W-2 and Information Returns.
- ✓ At JPT Financial Solutions we implement the general ledger, bank reconciliation and payroll reporting for the client.
- ✓ At JPT Financial Solutions we establish a system for bookkeeping.
- ✓ At JPT Financial Solutions we provide management reporting and analysis to accommodate the needs of the business owner.
- ✓ At JPT Financial Solutions we implement General Ledger / Journal Posting Entries.
- ✓ At JPT Financial Solutions we prepare Internal Management Financial Reporting.
- ✓ At JPT Financial Solutions we administer Estate and Trust Reporting.
- ✓ At JPT Financial Solutions we go into a difficult situation and organize it to a complete resolution.
- ✓ As a trusted advisor at JPT Financial Solutions, we serve as a financial confidante to talk to clients about what is going on with their business.
- ✓ As a trusted advisor at JPT Financial Solutions, we apply our professional eyes and ears to our clients personal and professional issues.
- ✓ As a trusted advisor at JPT Financial Solutions, we have a passion for helping people.
- ✓ As a trusted adviser at JPT Financial Solutions, we have a network of professionals to engage when a client's needs are outside our capabilities.

- ✓ So many clients we deal with have a loved one who needs to go to a nursing home. At JPT Financial Solutions, we can assist.
- ✓ Challenged by aging issues? At JPT Financial Solutions we provide eldercare accounting services.
- ✓ We are accepting new clients, and seeking consulting / project related engagements to build clientele. Provider of Eldercare Accounting Services, Consultant & Advisor Professional, Tax/Accounting Practitioner.
- ✓ Because I have received Jesus Christ as my personal savior & believe all aspects of my life to be lived to honor God, I will up-hold the highest Biblical standards in my transactions & will treat my clients with respect & integrity.  
– JP Timpano, CPA
- ✓ At JPT Financial Solutions we are recognized for superior organizational skills and attention to details.
- ✓ At JPT Financial Solutions we are self-motivated and thrive in positions where we can be creative and contribute our vision to better a process for the client.
- ✓ At JPT Financial Solutions we are team players who take great pride in our work and extend ourselves to offer help to our client as needed.
- ✓ Very simple. The scope of JPT Financial Solutions is to help consumers and businesses. Our scope is service.
- ✓ I have been able to couple my detailed experience as a caregiver for my parents into my CPA practice, showing where my talent is for people who are caretakers and don't have time to manage the finances of their parents.  
– JP Timpano, CPA
- ✓ As consultant and advisor professionals, we organize and develop a plan of attack to be used to solve financial problems that arise.
- ✓ As consultant and advisor professionals, we implement strategies and procedures to meet the objectives that need to be solved.
- ✓ We assist a family caregiver on the financial side by dimensioning & analyzing a loved one's total financial holdings & putting a process in place to coordinate the overall financial picture to secure adequate funding to pay monthly expenses.



- ✓ We have experience dealing with families of elderly individuals, helping them to manage their financial activity.
- ✓ In particular for families dealing with relatives who have dementia or who are homebound, we can assist in providing necessary financial care for your loved ones.
- ✓ We're here to help you. As key internal consultants, we provide you with specialized service to handle all types of specific financial situations and complexities.
- ✓ We are a customer-service driven provider of an umbrella of professional services including eldercare accounting services, consultation & advisory services, tax return preparation and general accounting services to business and consumer clients.
- ✓ We clearly do a lot more than just income tax preparation. Check out our vast umbrella of professional services!
- ✓ As eldercare accountants, we have extensive experience handling all financial issues for elderly individuals. This niche gives us the ability to provide added empathy for clients with aging issues.
- ✓ Our eldercare accounting services range from simple estate planning to more complete services such as managing finances and paying bills for elderly clients and their family in need.
- ✓ As eldercare accountants, we deal with more emotional issues when handling financial matters for our elderly clients. We have a great deal of patience, empathy and tact to serve our clients and their families with a quality of service and understanding.
- ✓ As eldercare accountants, we assist in getting your financial house in order during the care of the elderly client, and provide accounting services to the estate to wrap up financial matters after a parent's death.
- ✓ When your loved one's ability to manage finances is compromised, our eldercare accounting services can help. We provide the caregiver with needed everyday financial services to pay bills, manage bank & investment accounts, and organize financial records.
- ✓ At JPT Financial Solutions, we're not just about tax preparation. We also specialize as a provider of Eldercare Accounting Services. So many families need help handling challenges for our loved ones, and we're ready to serve you! Check us out.

- ✓ Our Consultant and Advisory Services at JPT Financial Solutions...  
<https://jptfinancial.com/consultation-advisory-services/>
- ✓ Our Eldercare Accounting Services at JPT Financial Solutions...  
<https://jptfinancial.com/eldercare-accounting-services/>
- ✓ At JPT Financial Solutions, we can help you organize & track your personal financial activity with our client financial position report. This helps identify all your financial accounts in one place to assess your overall financial & planning needs.  
[https://jptfinancial.com/files/financial\\_position\\_report.pdf](https://jptfinancial.com/files/financial_position_report.pdf)
- ✓ Our full brochure of professional services at JPT Financial Solutions...  
[https://jptfinancial.com/files/full\\_brochure\\_052410-1.pdf](https://jptfinancial.com/files/full_brochure_052410-1.pdf)
- ✓ Caring for an elder is very challenging. There are many things to consider, including managing the elder's finances & protecting the elder from family & 3<sup>rd</sup> party financial abuse. We can help you. Contact us. We offer Eldercare Accounting Services.  
<https://jptfinancial.com/eldercare-accounting-services/>
- ✓ Dear Senior, be at peace. We can assist you with your regular financial matters that you may find challenging. Contact us. We offer Eldercare Accounting Services. We're here to help you.  
<https://jptfinancial.com/eldercare-accounting-services/>
- ✓ You never need to be concerned about your privacy when working with JPT Financial Solutions. Our primary, ethical goal is to keep your financial and personal details private.
- ✓ We serve the role of consigliere and trusted advisor. We listen and advise.
- ✓ When a loved one or friend dies, & you are the executor, there's a lot to do. Many times as an executor you may be overwhelmed, or simply don't know what actually needs to be done. Contact us. We've had a lot of experience with estates & can help you!
- ✓ Quite simply, I named my company based on what we do. At JPT Financial Solutions, we provide SOLUTIONS for your financial needs. Check us out. See what solutions we can provide to you! – JP Timpano, CPA

- ✓ The greatest compliment you can give is a referral!

We are JPT Financial Solutions Inc., offering Eldercare Accounting Services, Consultation & Advisory Services, Tax Return Preparation & General Accounting Services to Business & Consumer Clients.

- ✓ We can set up a process for you to file taxes as a nanny or caregiver. We specialize in handling all nanny and caregiver financial responsibilities. Check us out. See how we can help you!
- ✓ We can set up the process for you to pay your nanny or caregiver as a W2 employer and can handle all payroll responsibilities on an ongoing basis. Check us out. See how we can help you!
- ✓ We provide Real Estate Closing Financial Services to assist in the buying/selling of your residence or business property. We work with your attorney to review & provide financial information necessary to close on your sale/purchase. We can help you!
- ✓ All businesses deal with cash flow issues. Doesn't matter if you are a small or large business. By definition, cash flow is part of any business. We can help you manage, track & get a handle on your cash flow analysis. Give us a call. We can help you.
- ✓ QuickBooks & Sage general ledgers do not replace the need of having a CPA for your business. A CPA professional will confirm GL postings, ensure tax & accounting compliance, & provide guidance & internal control practices for your business. Contact us.
- ✓ If you are an executor for an estate & do not know where to begin, reach out to us. There are a lot of to-do's, & you also may need to investigate the estate to ensure you've identified all assets & liabilities related to the estate. We can help you!
- ✓ About Us – JPT Financial Solutions, Inc.  
<https://jptfinancial.com/aboutus/>
- ✓ As a caregiver in the past for my parents while running my CPA practice, I am sensitive to the needs of other caregivers who do not have time to manage the finances of their parents. Contact us. We can help you to handle and manage this challenging need.

- ✓ A spouse may be concerned if he or she will be able to manage financial affairs should the other spouse become ill or die. We can personally meet with the couple to organize finances & set-up an ongoing plan to assist in times of need. We're here to help!
- ✓ Many people need general assistance in getting their financial life in order. We specialize in assisting clients in this endeavor.
- ✓ We specialize in assisting those who are in need of getting their financial affairs in order. Give us a call or email. We possess strong organizational skills to create the necessary comfort and order you desire.
- ✓ At JPT Financial Solutions, we offer Quality & Professional Service.
- ✓ At JPT Financial Solutions we take our professional due diligence very seriously. We first listen to the immediate needs of our clients, & then further analyze & review their situation to identify & dimension additional services that may be required.
- ✓ We support Caregivers and POAs for the Elderly with CPA financial services to help you do what you need to do. We can ease the stress. Contact us. We can help you.
- ✓ The experience of caretaking for my parents in the past, coupled with my CPA practice, demonstrates my talent for people who are caretakers and don't have the time to manage the finances of their parents. Contact us. We can help you.
- ✓ Our Eldercare Accounting Services can supplement the care that the Healthcare Proxy and/or Power of Attorney provides in the care of the Elder. We have a caring heart to assist in this special & challenging time of life.
- ✓ We recommend our semi-annual review process for the current year tax season to see where you are at the mid-year point, to address any potential tax shortfalls and/or refunds before year-end & estimate the remainder of the year results. Contact us.
- ✓ If you change jobs during the year or simultaneously work multiple jobs, be certain that your tax withholdings are correct. Your combined earnings may put you in a higher tax bracket. Contact us before year-end to do a review of your tax withholdings.
- ✓ No matter how much you earn, all of us are concerned with our financial position and budgeting our revenues and spending. Give us a call to discuss. We can help you get a handle on your financial picture.

- ✓ If you get a large salary bonus during the year, remember your tax withholding for that payment may not be sufficient, as the large bonus may now put you in a different tax bracket. Contact us to analyze your payroll withholdings before year-end.