PERMANENTLY SLASH YOUR TAX BILL

SERVICE BROCHURE

Things to review before your call!

Everything you need to know (and a bit more!) before you get on a call with us!

Peter Holtz CPA

PETER HOLTZ, CPA

Founder
Peter Holtz CPA

With over 35 years of experience, we understand what is needed for your business to run successfully. We have a dedicated team and expert staff focusing on data driven decisions and KPI analysis for optimal results.

With the big picture in mind and a strategic approach we don't just do the basics. We want you to continue to be excited & passionate about your business while we handle the financial aspect. This allows our clients to focus on vision, growth & profitability. We work together to create processes to meet goals, hold you accountable, and grow your business.

When you work with us, we organize and streamline processes for efficiency which prepare you for growth, while also saving on taxes.

www.PeterHoltzCPA.com

Meet Your Team of Experts

Peter Holtz, CPA
PRESIDENT

Tenille Rios
DIRECTOR OF OPERATIONS

Jenni Mize
DIRECTOR OF IMPLEMENTATIONS

Annmarie Kehle
DIRECTOR OF BUSINESS DEVELOPMENT

Marianne Abellana
DIRECTOR OF INTERNAL AUDIT

Jerry Llorin, CPA
PLATINUM ADVISOR

Vinh Nguyen, CPA
PLATINUM ADVISOR

Manjinder Singh, CPA
PLATINUM ADVISOR

Mac Quinn, EA
PLATINUM ADVISOR

Natasha Cardoso
PLATINUM ADVISOR

Sally Henien
PLATINUM ADVISOR

Juan Rios
BUSINESS DEVELOPMENT MANAGER

Things to review before your call!

Thank you for booking a call with us!

We appreciate your interest in working with the Peter Holtz CPA team to take control of your taxes and scale your business.

The purpose of this call is simple: to see if we're a good fit.

If we believe we can help, we'll walk you through exactly how our process would work for your specific situation. Then you can decide if you'd like to become one of our success stories.

At this point, you are likely asking yourself, "Will this work for ME?"

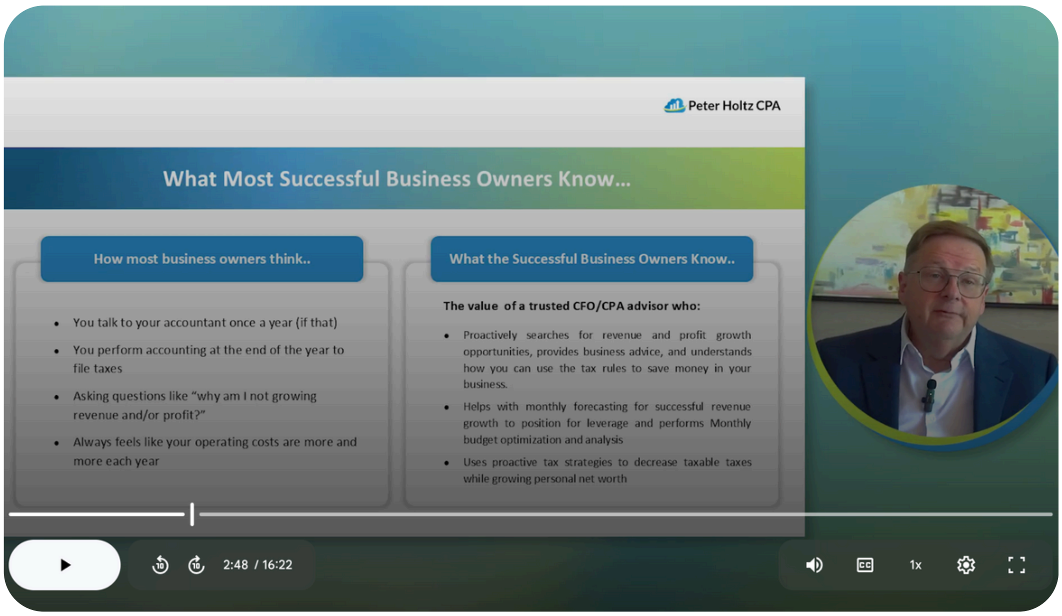
Most business owners we work with are looking for someone to do the heavy lifting when it comes to creating and implementing strategies that will lower their tax bill.

To help you make an informed decision, we've included a few short videos below — covering client success stories, common concerns, and frequently asked questions.

We'll know if this is the right fit once we get into the details on the call, but you'll get the most value if you watch these before we speak.

WHAT YOU NEED TO KNOW TO PERMANENTLY SLASH TAXES:

How to Save Taxes, Multiply EBIDTA, and Grow Profits

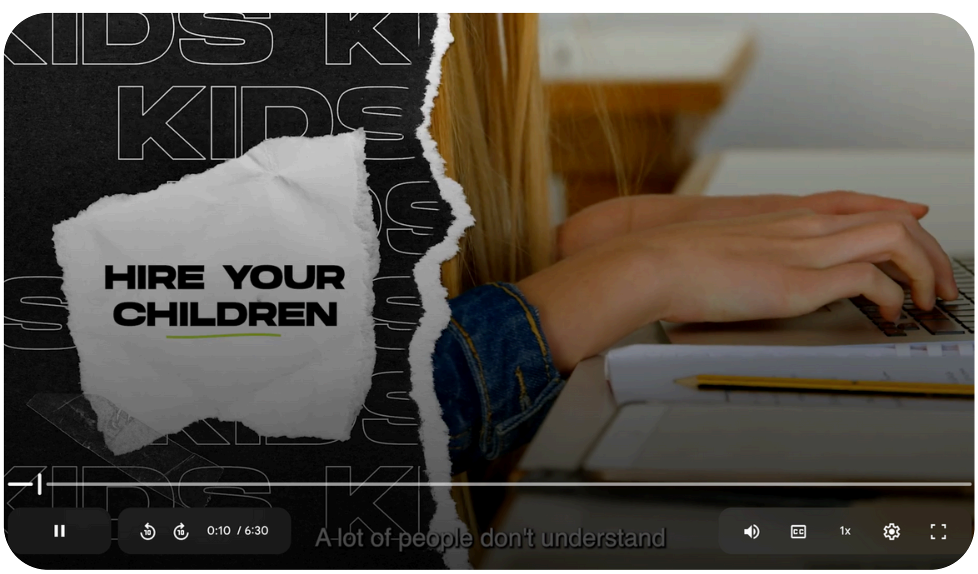


Is your accountant working for you or the IRS?

DISCOVER STRATEGIES THAT ACTUALLY MOVE THE NEEDLE:

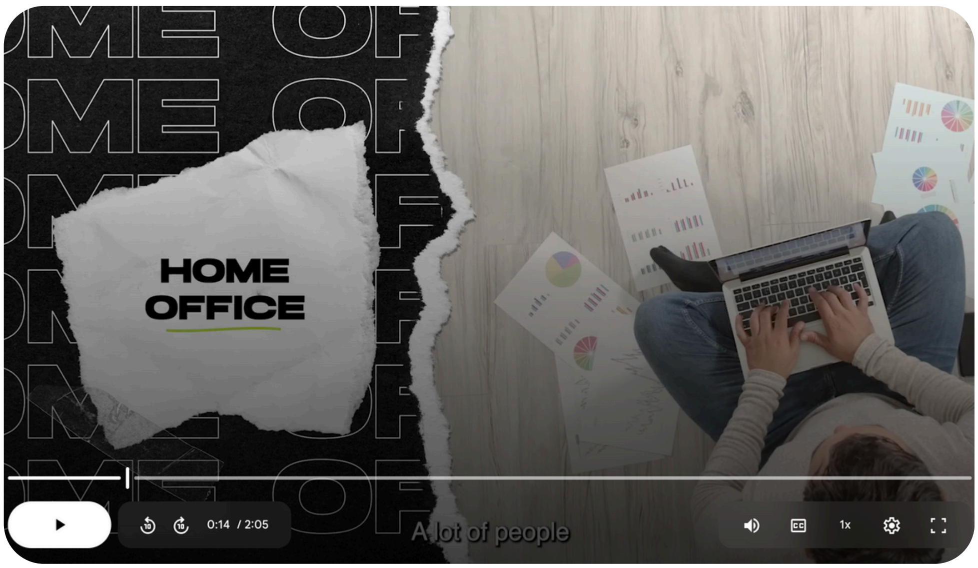
Augusta Rule

Hire Your Kids OR Parents Tax Free



DISCOVER STRATEGIES THAT ACTUALLY MOVE THE NEEDLE:

Home Office Deduction



Medical Expense Reimbursement Program

DISCOVER STRATEGIES THAT ACTUALLY MOVE THE NEEDLE:

Write Off Your Vehicle

Everything You Need to Know About the Big Beautiful Bill

HEAR FROM OUR CLIENTS

Ryan Micheletti
Cofounder and CFO At Shield Corps Security

Sander Alves
4 reviews

★★★★★ 5 months ago

Peter Holtz is absolutely one of the best CPA around us. After several years looking for a good CPA I finally found one. Peter really cares about his client's and his business, whatever you ask a question or needs anything, he replies momentarily or no later than hours. They helped me get structured properly for my business entities and educated me on the differences of LLC, S-Corp or C-Corp and why one over the other would make more sense. I highly recommend Peter to anyone.

Dezlymaree B
7 reviews

★★★★★ 3 months ago

My experience with Peter Holtz CPA has been fantastic! Annmarie is incredibly knowledgeable, personable, and always willing to go the extra mile. Thanks to their expertise, I was able to **save money** on my taxes—which is always a plus! They truly go above and beyond for their clients. Highly recommend!

Frequently Asked Questions (1/3):

What makes your firm different from a traditional CPA or tax preparer?
Unlike most CPAs who simply record history, we proactively design your financial future. We specialize in advanced tax strategy—helping high-earning business owners legally reduce taxes, protect assets, and grow using proactive planning, not just preparation.

Who is a good fit for your services?
Our ideal clients are business owners $100k/year in taxes, especially those with multiple income streams, investment properties, or complex financial structures who feel they're paying too much in taxes or flying blind.

What is a Platinum Advisor?
A Platinum Advisor is your personal Outsourced CFO. Peter has hand picked each advisor and trained them on the same strategies after seeing behind the scenes into Fortune 50 companies, and how they manage their accounting, taxes, and finances. Leveraging the behind the scenes with modern day tax codes, your Platinum Advisor is able to deliver unprecedented savings and financial insights to your business.

How much money can I realistically save with tax planning?
While savings vary by situation, many of our clients uncover tens to hundreds of thousands in potential annual tax savings.

Is this legal? Will these strategies trigger an audit?
Yes, this is legal —everything we do is rooted in the tax code and designed to be audit-resilient. We even include an audit defense assessment in our analysis, ensuring your plan is not only strategic but also defensible.

Frequently Asked Questions (2/3):

What's included in a full tax plan engagement?
Our comprehensive plans include strategy design, implementation support, tax prep, and ongoing guidance. This means your taxes are filed correctly, your strategies are executed properly, and you stay on track year-round.

Do you also file taxes, or just provide planning?
We handle both. While tax prep isn't mandatory to work with us, most clients prefer we file for them to ensure the strategy and filing are seamlessly aligned—especially since we often clean up mistakes from past returns.

How long does it take to see results?
Once we receive your documents, we typically deliver the tax plan within 5-7 business days. You'll then schedule a kickoff call where we walk you through everything in plain English—no confusing tax jargon. Tax planning is an ongoing engagement that we proactively manage for you year round.

What kind of red flags do you usually find in tax returns?
Common issues include missed deductions, improper expense classifications, Schedule C errors, and risky DIY tax software assumptions. These mistakes often result in overpaid taxes and increased audit risk.

Can you work with clients in all 50 states?
Yes, we work remotely with clients nationwide with systems that are built for secure, streamlined digital collaboration, so geography is never a barrier to getting strategic tax support.

Frequently Asked Questions (3/3):

What if I already have a CPA or bookkeeper?
That's fine—we frequently partner with existing CPAs and bookkeepers. However, many clients choose to consolidate services with us after realizing the value of integrated planning, prep, and strategy in one place.

How much does it cost?
Our pricing depends on complexity, but we always aim for a minimum 10x return on your investment. Your Platinum Advisor is bringing custom strategies tailored to your unique situation so we price depending on complexity and workload.

Do you handle entity structuring and setup too?
Yes. We help evaluate and restructure your entities for maximum tax efficiency—whether that's setting up an S or C corp, real estate holding company, or a custom combination based on your income and goals.

What if I've made mistakes in past returns?
No problem. We frequently identify and fix prior-year issues and file amendments when necessary. Our goal is to protect you moving forward while maximizing your savings in the current and future tax years.

How do I get started?
On our strategy call, we'll determine if we're a good fit for each other. If we are, we'll take a look at your tax return and see what type of savings we can deliver. It's the first step to seeing what's possible. From there, you'll know exactly what's been missed, what could be saved, and how to move forward with confidence.