Accounting Projects

**Company Description:**
CPA firm performing accounting services, bookkeeping, payroll, and tax preparation and planning.

**Short Project Name:**
Bookkeeping services for Dance choreographer.

**Project Description and Deliverables:**
Performing bookkeeping services for Dance choreographer for multiple years, starting with the 2008 calendar year, using QuickBooks accounting software. Bank and credit card statements will be used for multiple checking, savings, and credit card accounts to capture data into QuickBooks. If categories are unknown or unspecified, then transaction should be posted to "Ask My Accountant" expense category for further follow up and clarification with client. Familiarity with dancing and choreography industry is a plus.

Key Deliverables
Bookkeeping for full calendar years from 2008 thru 2012.

**Company Description:**
a full service CPA firm headquartered in the San Francisco Bay Area. Nationally recognized as one of the top accounting firms in the country. Sought after for complicated domestic and international tax work for individuals, closely held companies, family offices and clients expecting a liquidity event. Services provided include: • Personal, Business and Corporate Tax Return Preparation, • IRS Audit Consulting, Preparation and Representation, • International Tax Structure and Compliance, • Wealth Preservation

**Short Project Name:**
Accounting Business Development, High Value Targets

**Project Description and Deliverables:**
There is a lack of a readily available data base of high net worth individuals residing within the San Francisco Bay Area that is both current and inexpensive to access.

Build a team representing IT, Marketing, Accounting and legal disciplines, working together to research and create a data base of high net-worth individuals located in the San Francisco Bay Area. The hope is that this project will also benefit the students involved because every professional service firm, be it IT, Accounting, Law, etc. suffers from a poverty of talented practitioners that also have the ability to market themselves and their firms. Entering the job market with experience developing such a high value data base could prove invaluable to the students involved as they attempt to garner highly sought after internships, positions with elite firms and begin to build their own personal practices and careers.

Key Deliverables
Build a data base of individuals residing in the San Francisco Bay Area that are of high net-worth or expecting a liquidity event, such as IPO, merger, etc. Contain contact information that is current, accurate and obtained, stored and accessed in an appropriate manner.

**Company Description:**
We are looking for a team of smart finance and accounting oriented students to develop and implement a Quickbooks based accounting, finance and tax systems.

**Short Project Name:**
Finance, Tax, Accounting, and HR

**Project Description and Deliverables:**
Specifically we are looking for the project team to establish a Quickbooks based a chart of accounts, annual budgeting process, tax filing process, and a five year financial plan. In addition, the team will develop a paper-based and electronic filing system for all of the company financial and legal records and establish retention policies for the company's tax, accounting and legal records. Establish job description and HR polices and Employee Handbook.

Key Deliverables
The key deliverables are:
1. Implement Quickbooks based accounting system
2. Establish tax filing forms, schedules, process
3. Develop annual budgeting process and budget for the next 12 months
4. Develop a five year financial projection
5. Develop policies and processes for records retention both electronic and paper-based records
6. Develop HR policies, employee job descriptions and Employee Handbook
7. Document all policies and processes