



Technology

companies

Early stage

Your imagination. Amplified.

You've poured your passion into your company and you've successfully gotten it off the ground.

But you have big challenges to overcome:

- Growing your business
- Scaling your solution
- Finding investors
- Connecting with customers
- Hiring the right team
- Setting employee benefits
- Valuing your business
- Meeting regulatory compliance

Not to mention, you've got to juggle the basic tasks of managing your finances, accounting and taxes.

All this can drain your creativity and energy, keeping you from turning your dreams into a reality.

That's where we come in.

Our integrated solutions — such as business management support, financial planning, outsourced accounting and employee stock option planning — can fuel your growth. With more than 100,000 clients, our firm has the connections you need to get to that next stage.

And our outsourced finance and accounting solutions can free you up to focus on your dream.

Our team at Wipfli is more than your basic consulting and accounting professionals. We chose to specialize in helping technology companies like yours because we share your passion for the future. Innovation flows through our veins.

Contact us today. We're ready to help stabilize your foundation so you can soar.

wipfli.com/tech-companies

Shape the future. Don't follow it.

WIPFLI

Solutions for early stage technology companies

In addition to our strategy, management and consulting services, our experienced associates can handle all your finance and accounting needs. Choose one of our packages below.

Service	Launch includes:	Burn includes everything in Launch, <i>plus</i> :	Scale includes everything in Burn, <i>plus</i> :
<p>Financing and value management Reduce the chances of critical early mistakes that can have a lingering detrimental impact in your ability to gain early success right out of the gate.</p>	<ul style="list-style-type: none"> Provide high-level feedback to business plan. Develop strategic networking plan. 	<ul style="list-style-type: none"> Introduce founders to ecosystem network. Provide pitch feedback and coaching. Review and comment on prepared budgets and forecasts, cap table, financial analyses and models for investor presentation. 	<ul style="list-style-type: none"> Review entity agreements and assist with cap table maintenance. Assistance with preparation of budgets and forecasts, financial analyses and models. Determine metrics and meet on monthly basis to discuss financial analysis and results.
<p>Accounting management Save valuable time, freeing you to focus on the tasks that you find most rewarding by gaining access to a professional who can find and fix financial problems before they get out hand and create peace of mind with on-going fiscal management.</p>	<ul style="list-style-type: none"> Set up QB online with basic account and general ledger structure, including annual license. Reconcile one bank and one credit card account on a quarterly basis. Up to two hours per quarter to review financial activity and provide feedback. 	<ul style="list-style-type: none"> Reconcile one bank and one credit card account on a monthly basis. Assist with payroll processing. Up to two hours per month to review financial activity and provide feedback. 	<ul style="list-style-type: none"> Perform revenue recognition assessment for one contract template. Provide basic financial dashboard. Two phone or video conferences per year to review financial results.
<p>Tax management Feel confident knowing you have a roadmap for navigating the organization's tax compliance requirements when we assist in identifying and implementing tax-planning opportunities.</p>	<ul style="list-style-type: none"> Evaluate entity structure selection and application for FEIN. Prepare business income tax returns – federal and one state. Prepare annual 1099s up to five forms. Discuss angel and research tax credits and other startup incentives. 	<ul style="list-style-type: none"> Prepare FEIN application and other related new company supporting forms/schedules. Prepare founder's individual income tax returns – federal and one state. Review documentation required for angel and research tax credits. 	<ul style="list-style-type: none"> Evaluate pros and cons of hiring employee versus independent contractor. Develop year-end income tax planning. Prepare all annual 1099s - no limit. Prepare documentation required for angel and research tax credit.

Let's get started

Connections matter in the technology world. We not only can provide you with integrated management services, we can also connect you with the right players. Contact us to learn more or get started with a complimentary meet-to-learn.

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