

Experience Matters

Cheryl Wilson

is an Enrolled Agent, licensed to practice before the IRS, and has a Bachelor's Degree in Accounting. She is also a Certified Financial Planner.

She strives to work with all clients holistically, looking at their entire financial situation, including Taxes, Accounting, Estate Planning, and other financial decisions that surround their lives.

We have a full accounting staff to work with and assist Cheryl. Most questions can be answered by anyone on the accounting staff.



We are always flexible in working with any client – respecting their personal needs and schedules.

In addition to providing set up, data entry, clean up and review services; we specialize in working with, educating and training our clients in the use of Quickbooks and the understanding of the reports it produces.



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Specializing in helping
Small Businesses

Bookkeeping
Certified Quickbooks Professional Advisors
Sales Tax (TPT) Reports
Payroll Services
Financial Reports
Business and Personal Tax Returns
Business Reviews

CD Tax & Financial Partners specializes in helping small businesses.

We work closely with our clients to ensure they are educated in all areas of accounting and tax related issues. Our staff attends many seminars throughout the year staying abreast of any tax law changes ranging from TPT to payroll to income tax. We bring this information back to our clients and share with them the changes that will affect them as a group, in our newsletter, and individually. With this knowledge our clients are prepared to make educated business decisions and can prepare for any pending tax liabilities.



We provide bookkeeping services tailored to fit each client's specific needs.

Our clients' needs are never placed in a generic group of one size fits all. We work individually with each client to ensure they receive the best, maximum, individual service we can provide. We are available by telephone, email or personal meetings.

Full Service Accounting

We're Here to Serve You!

For accounting clients that would like an ongoing relationship and review of their tax situation we can provide the following services on a weekly, monthly or quarterly basis:

Data entry of invoices, sales receipts, customer payments, vendor checks or bank debits, credit card charges, etc.

Bank and Credit Card Reconciliations

Sales Tax (TPT) Reports

Payroll Services and Reports

Financial Reports

Business and Personal Tax Returns

Business Reviews

As QuickBooks Advisors we are able to offer you the following QuickBooks Consulting services:

QuickBooks Setup

QuickBooks Phone Consultations

QuickBooks Remote Access

QuickBooks Training/Seminars

QuickBooks Payroll

We are happy to include other services your personal situation may require.

The above services are packaged according to individual client needs. We provide a free consultation to determine what services your business may require.

For our clients that do most of their own data entry, we have a secure upload site on our website at www.cdtax.com.



This site can be used to exchange various computer files including QuickBooks backups, pdf files and Excel worksheets.

This saves our clients the time it takes to bring this information by the office.

The site is password secured, and only your business and ours has your individual password.

We use Quickbooks software and provide training and support for our clients.

We are Certified Quickbooks ProAdvisors. This requires many hours of training and testing through Intuit, the maker of Quickbooks software, enabling us to train and work with our clients in all areas of QuickBooks software.



We provide a one-on-one training service for Quickbooks software designed specifically for your business. Most clients are successful with one or two training sessions and the follow up support we provide.