



Independent Contractors & 1099 Workers

Help 1099 earners run like a business, with books your CPA will thank you for.

What we deliver

- Forming the LLC and getting the EIN
- Separating business and personal finances
- Invoice templates and payment tracking
- Expense and mileage tracking systems
- Year-end records organized for your CPA

What we hear

"Taxes surprise me every April."

No estimated payments and no records means one painful bill a year.

"My receipts are in a shoebox."

Lost receipts and untracked mileage are deductions left on the table.

"I invoice from my phone notes."

Inconsistent invoices make getting paid slower and look less professional.

How the work runs

- WEEK 1** Separate: A business account and simple system for every dollar in and out.
- WEEK 2** Track: Expense, receipt and mileage tracking that takes minutes a week.
- QUARTERLY** Plan: Estimated tax dates calendared with your numbers organized for your CPA.
- YEAR END** Hand off: A clean, organized package your CPA can file from.

Who we work with

Dispatchers

Drivers and couriers

Realtors

Consultants

Creatives

Gig and delivery workers

Tradespeople

Documents we keep in order

- W-9 on file
- 1099 forms received
- Invoice templates
- Receipt archive
- Mileage log
- Business account statements

Capabilities engaged

Consulting & Strategy

Operations & Back Office

Business Filings

Document Services

Connections & Vetting

Technology Setup

Clear lines

We handle

Set up separation and tracking
Build invoice and payment systems
Organize records for your CPA
Form the LLC and EIN if you decide to

Licensed professional

Tax advice and returns (CPA)
Entity choice (CPA or attorney)
Retirement and investment advice (licensed advisor)
Legal review of contracts (attorney)

Not a CPA firm. We organize; your CPA advises and files.