WCG Inc.
certified public accountants • business advisors

tel 719.387.9800
txt 719.345.2100
fax 855.345.9700

# Referrals

WCG has selected the following trusted providers for bookkeeping, sales tax, health insurance including HSA / HRA, legal representation, 401k / cash balance plans and financial advisors. We are not affiliated with these providers and we do not receive a "kickback" or share in revenues. Each third-party provider is independent and will quote fees for their services. However, if you find that the service levels you have come to enjoy from WCG is not being replicated by a provider, please let us know.

## Sales Tax

TaxJar
www.taxjar.com

Avalara
www.avalara.com

Peisner Johnson (consultants, sales tax problems)
www.peisnerjohnson.com

Avoid TaxValet

## Health Insurance / HSA / HRA and Disability Insurance

Designed Health (**health insurance**, HSA, HRA info)
Josiah Allis
josiah@designhealth.com
www.designhealth.com
720-445-9433

TASC (HSA, HRA info)
Eric Smith
Eric.smith@tasconline.com
www.tasconline.com
800-422-4661 ext 8843

Zane Benefits (HSA, HRA info)
www.zanebenefits.com
800-376-9185

Base Online (HSA, HRA info)
www.baseonline.com
888-227-3105

## Company 401k Plans, Cash Balance Plans, Self-Directed IRA

SurePayroll 401k (we use these guys for ours)
Tim McDonald
tim.mcdonald@surepayroll.com
www.sure401k.com
877-954-7873 ext 5288033

Polycomp (profit-sharing and DB pension plans)
Pamela Stitt
pstitt@polycomp.net
www.polycomp.net
916-773-3480 ext 2025

New Direction Trust Company (**self-directed IRA**)
303-546-7930
info@ndtco.com

## Financial Advisors, IRAs, Solo 401k Plans

WCG used to have a sister company named SFD Capital which was a Registered Investment Advisory firm. We have since transitioned away from providing that service directly, but we remain very much in tune with investment concepts and financial planning. In addition, Tina Watson, CPA and Sally Rhoades, CPA are also Certified Financial Planners (CFP®). However, for IRA / solo 401k setups and investment advice, we suggest the following-

Rainsberger Wealth Advisors
Mindy Sutton, MBA, JD
www.RWAPartners.com
msutton@rwapartners.com
980 Pico Point
Colorado Springs, CO 80905
719-328-1944

One Brick Planning
Aaron Connell, EA
aaron@onebrickplanning.com
720-575-0549

Peace of Mind Financial Planning
Linda  Leitz, PhD, CFP®, EA
www.PeaceofMindFinancialPlanning.com
linda@peaceofmindfin.com
719-836-8181

TD Ameritrade (SFD Capital used TDA to custody assets)
https://www.tdameritrade.com
800-454-9272

Charles Schwab
https://www.schwab.com/
888-245-6864

Fidelity
https://www.fidelity.com/
800-972-2155

## Attorneys (Colorado Licensed)

Colorado Law Group (these are our attorneys)

John Stinar (general biz law, operating agreements)
john@coloradolawgroup.com

Ian Burrell (general biz law, operating agreements)
ian@coloradolawgroup.com

Chris Wilhelmi (employment law, litigation)
chris@coloradolawgroup.com

Paul Kloster (contract law, construction, real estate)
paul@coloradolawgroup.com

719-635-4200

Fox Rothschild LLP
Jennifer Benda
jbenda@foxrothschild.com
303-446-3848

Justin Fish Legal, PC (**estate planning**)
justin@justinfishlegal.com
719-493-9003

Sparks Willson Borges Brandt & Johnson, P.C.
Robert Willson
719-634-5700

Law Office of Adam Weitzel (general biz law)
Adam Weitzel
adam@businesslawgroup.us
719-355-8840