

Referrals

The Watson CPA Group 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 the Watson CPA Group is not being replicated by a provider, please let us know.

Bookkeepers

180 Accounting (13-person team, structured)

Jerry Lomax

jlomax@180accounting.com

www.180accounting.com

719-495-9688

Bench (online bookkeepers, efficient)

help@bench.co

<https://bench.co/partner/watson-cpa/>

888-760-1940

Mile High Bookkeeping Service (1-person team)

Cindy Squires

cindy@milehighbooks.com

www.milehighbooks.com

720-772-8636

Sales Tax

TaxJar

www.taxjar.com

Peisner Johnson (consultants, sales tax problems)

www.peisnerjohnson.com

Avalara

www.avalara.com

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

Zane Benefits (HSA, HRA info)

www.zanebenefits.com

800-376-9185

TASC (HSA, HRA info)

Eric Smith

Eric.smith@tasconline.com

www.tasconline.com

800-422-4661 ext 8843

Base Online (HSA, HRA info)

www.baseonline.com

888-227-3105



tel 719.387.9800 📞

txt 719.345.2100 📱

fax 855.345.9700 📠

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

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

Barlow Consulting, Inc.
Brad Barlow
barlowconsultinginc@gmail.com
412-498-6993

New Direction Trust Company (**self-directed IRA**)
303.546.7930
info@ndtco.com

Financial Advisors, IRAs, Solo 401k Plans

The Watson CPA Group 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. We believe retirement is straightforward; index funds, rentals, a household budget and a plan is all most people need, yet most financial advisors complicate it in favor of high fees. This unnecessary complication is what we call the illusion of precision.

Enough soapboxing... We can help with basic retirement concepts and tax 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-

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

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

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