PROCTOR & ASSOCS.
Tax • Accounting • Payroll

ProctorAssocs.com
704 - 385 - 1040
Info@ProctorAssocs.com

# BIG-FIRM EXPERTISE. HOMETOWN CARE.

You deserve more than a cookie-cutter solution. We *Go Beyond the Numbers* to help you avoid surprises, make smarter decisions, and move forward with confidence, all backed by a team that knows you, your goals, and your story.

## WHO WE ARE

Proctor & Assocs. is a full-service accounting and advisory firm with 20+ years of experience in serving individuals, families, and businesses across the Southeast. By merging big-firm expertise with modern technology, we provide year-round clarity, proactive guidance, and dependable support, helping clients make confident financial decisions without the stress, confusion, or surprises that often come with managing finances alone. We combine big-firm expertise with hometown care, delivering personalized service, clear communication, and financial insight that supports real-life goals.

## WHAT WE DO

### Tax Preparation
Accurate, timely tax filing for individuals and businesses with a focus on clarity, compliance, and maximizing your financial position.

### Tax Planning
Year-round strategies designed to reduce tax liability, anticipate changes, and help you make smarter financial decisions.

### Bookkeeping
Reliable monthly financials that give you a clear picture of your business performance — without the headache of managing the details yourself.

### Payroll Services
Accurate, on-time payroll for businesses of all sizes, ensuring your team is paid correctly and your compliance stays intact.

### Business Advisory
Practical, real-world financial guidance that helps business owners understand performance, cash flow, hiring, growth, and major business decisions, and more.

## WHO WE SERVE

- Healthcare practices
- Professional service firms
- Construction & trades
- Legal Practices
- High-earning professionals
- Growing families

## WHY CLIENTS CHOOSE US

- Clear, jargon-free communication
- Year-round support (not just tax season)
- Proactive planning and guidance
- Modern tech that makes working with us easier
- A team that treats clients like family
- Deep experience across industries and life stages

"We've been with Proctor & Assocs. since we started and are thrilled with them. They are responsive, deliberate, accurate and fun to work with."
- Dan M.

“They are extremely proficient and thorough. This is a business that helps you consider the best scenarios for maximizing your tax responsibilities, refunds, and vision as your business grows or faces challenges. Use them!”
- Nicole N.

“Proctor & Assocs. are the best! They tackled my tax issue like it was a piece of cake and they did it all with grace, kindness, patience, and competence.”
-Melissa

## Avoid costly surprises and uncover hidden opportunities.

As a **ProcuraFind** member, your first step is simple: take the P&A Financial Health Quiz and receive a personalized report built just for you.

Click or scan the QR Code to access the Proctor & Assocs. Financial Health Quiz