



# Daysi Jacobson

Accounting, Tax & Financial Strategies

We deliver **quality**  
**accounting solutions**  
to make your business thrive.



**Stress-free Tax and Accounting Services.**

**We Know the IRS IN & OUT!**



## Who we are?

With more than 20 years of accounting experience working in and outside the IRS, Daysi Jacobson provides unparalleled and personalized accounting services for everyone.

"Our primary goal as a trusted advisor is to be available and to provide insightful advice to enable our clients to make informed financial decisions. We do not accept anything less from ourselves and this is what we deliver to you" Daysi Jacobson – Founder & CEO.

Located in the beautiful Ponte Vedra Beach ranked by Money Magazine as one of Highest Income Areas in Florida . We are an Award Winning Tax Preparation & Accounting Services Company.



We are a team of friendly, experienced professionals dedicated to delivering quality accounting solutions.

Our experience goes beyond any local or regular accounting firm you have worked before.



**10 years working as a Federal Revenue Agent for the Internal Revenue Services**, allows our firm to have the insight, knowledge, and experience that will help you navigate the complicated tax laws with ease. We are committed to providing education, support, and guidance throughout the entire process.

**While working for the IRS Daysi Jacobson had the responsibility of:**

- **Conducting independent examinations and related investigations** of income tax returns that covered a diversified spectrum of individual and business taxpayers, including sole proprietorship, partnerships, fiduciaries, small-size C Corporations, and S Corporations. Examinations may also contain special audit features or anticipated accounting, tax law, or investigative issues.
- **Conducting examinations** to detect unreported income from individual and business taxpayers using financial and other investigative skills.
- **Conducting package audits** to determine that other required returns such as information, excise, or specialty returns are filed and conduct concurrent examinations or make referrals of these and other returns when warranted.
- **Identifying issues** to be pursued based on large, unusual, or questionable items which produce significant tax or compliance effects and utilizing the appropriate tax law and facts needed to resolve them.
- **Utilizing standard accounting methods** and techniques during examinations in order to develop information regarding the income and financial operations of taxpayers.
- **Examine accounting systems** and records including computerized accounting and financial information systems which reflect a variety of complex financial operations.
- **Confer with taxpayers** or their representatives to explain the accounting and other issues involved and the applicability of pertinent tax laws and regulations and explain proposed adjustments.





## **For Individuals** **The Stress of Tax Season is Real!<sup>1</sup>**

### **Stress-free Tax and Accounting Services**



#### **Tax Advisory Services**

##### **Consultation**

Tax Advisory services includes analyzing financial and tax problems, formulating solutions, and making recommendations designed to provide advice on taxation for clients ranging from individuals to business.

##### **Tax Planning for Individuals & Businesses**

Tax planning is crucial to make sure everything is handled correctly. In addition to reducing filing errors and preventing unnecessary audits. We'll be able to advise you on how much money your business needs

to put aside – so there aren't any surprises. Tax planning helps clients understand the tax effects of each financial decision.

##### **Tax Resolution | Tax Representation Federal & State**

Tax resolution is a process that is handled by a tax resolution company to assist you with any debt that you have with the IRS. The goal is to minimize what you owe to the IRS as much as possible. Tax resolution is usually needed when someone owes the IRS back tax and has put off paying it for a length of time.



#### **Tax Return Preparation Services**

##### **Individual Tax Returns**

Tax preparation is the process of arranging and filing tax returns in compliance with federal and state tax laws. After a taxpayer file their return, they'll find out whether they owe the IRS money or if they'll receive a tax refund.

##### **Business Tax Returns**

If you own a business, you need to file a company tax return. A business tax return reports your company's income, tax deductions, and tax payments. All businesses must file tax returns.

<sup>1</sup>Source: By Denise Powell, CNN Published 4:42 AM EDT, Fri April 12, 2019 <https://www.cnn.com/2019/04/12/health/tax-day-money-stress/index.html>



## For Businesses

**80% of Small Business Owners Feel Stressed During Tax Season<sup>2</sup>. We will ensure that all your financial decisions are made carefully and with your best interests in mind.**



## Accounting Services

### Bookkeeping & Quickbooks Assistance

Bookkeeping is the most basic accounting service; it helps your business have all its financial information in order. Bookkeepers help your company keep records of financial transactions in order and up to date.

### Payroll

Payroll accounting consists of preparing, creating, and keeping all workers' payroll documents. This includes data like paychecks, taxes, benefits, and bonuses each employee receives.

Payroll Accounting makes sure that all the information follows the government's guidelines. Payroll accounting helps companies ensure employees payment, accurate tax returns, and consistent

file reports. Something to keep in mind is that payroll accounting is important to all businesses of all sizes.

### Sales Tax

A sales tax is a consumption tax imposed by the government on the sale of goods and services. A conventional sales tax is levied at the point of sale, collected by the retailer, and passed on to the government.

A business may be liable for sales taxes in a given jurisdiction if it has a presence there, which can be a brick-and-mortar location, an employee, or an affiliate, depending on the laws in that jurisdiction.



## Business Formation

### We help international companies gain access to the US market

Business formation is the decision that needs to be made when creating the structure of your business. Choosing between different business structures, such as a sole proprietorship, a partnership, an LLC, a corporation, and a non-profit, will impact the future decisions you'll make for your business.

Choosing the appropriate business formation from the start is an important strategy for determining your responsibilities, liabilities, privileges, and restrictions.

### S-Corp Election & Late S-Corp Election

An S Corporation, also known as an S Corp, is a specific type of corporation that is created by filing and IRS tax election. This allows those that can avoid double taxation while protecting the owner from liability. S Corps are the most common type of corporation. About 70 percent of all corporations are an S Corp.

**We are here to give you Peace of Mind, because we bring you Solutions.**

<sup>2</sup>Source: March 10, 2023 The Ascent, A Motley Fool Services. <https://www.fool.com/the-ascent/taxes/articles/80-of-small-business-owners-feel-stressed-during-tax-season-heres-how-to-get-through-it/>



## Business Development

**Daysi Jacobson Group brings together leaders in finance, investments, technology, and strategy with one clear mission: to empower businesses and capital funds to grow sustainably and build long-lasting value.**

With a strong foundation in financial expertise and a visionary approach to strategy, Daysi Jacobson and her team design comprehensive solutions that guide organizations through every stage of their journey, from business planning and structuring to the creation of tailored investment vehicles. Our work is centered on fostering relationships of trust and impact, connecting companies with the right resources, partners, and opportunities to scale effectively. By integrating financial innovation, and strategic insights, we enable our clients to transform challenges into growth opportunities.

At Daysi Jacobson Group, we believe that success is not only measured in profits but also in the ability to create ecosystems where businesses, investors, and communities thrive together. Our purpose is to accompany every client with personalized strategies that open doors to capital, strengthen decision-making, and drive sustainable growth.

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Jacobson Wealth Builders offers our vast selection of financial strategies and services through relationships with some of the most well-known providers and carriers in the industry. In fact, each provider we partner with must be rated A or higher by industry standards.

Although no single strategy can address all of your financial concerns, our wide range of products and services provides the foundation you need to begin pursuing your goals. Discover how **Jacobson Wealth Builders** agents can assist you.



### Financial Strategy Services

- Financial Needs Analysis
- Financial Goal Setting
- Strategies to Pursue Your Goals



### Insurance Solutions

- Life Insurance
- Disability Insurance
- Long Term Care Insurance (U.S. Only)
- Segregated Funds (Canada Only)
- Guaranteed Interest Accounts (Canada Only)



### Retirement Strategies

- Annuities
- Registered Retirement Savings Plans (Canada Only)
- Tax-Free Savings Accounts (Canada Only)



### College Funding Plans

- Preparing for college (U.S. Only)



### Business Strategies

- Insurance Strategies
- Retirement Strategies
- Executive Compensation (U.S. Only)
- Business Continuation Programs (U.S. Only)



### Estate Preservation

- Charitable Strategies & Trusts (U.S. Only)
- Life Insurance Trusts (U.S. Only)
- Wealth Replacement Trusts (U.S. Only)
- Life Insurance (Canada Only)
- Annuities (Canada Only)

## JWB Network of Providers

**Jacobson Wealth Builders** offers our vast selection of financial strategies and services through relationships with some of the most well-known providers and carriers in the industry. In fact, each provider we partner with must be rated A or higher by industry standards.



## Our Values

At Daysi Jacobson, we pride ourselves in our three core values.

- **Professionalism:** Through our years of experience and specialized expertise our staff, we ensure each client receives the close personal and professional attention that they require.
- **Responsiveness:** Companies and individuals who choose Daysi Jacobson rely on fast and accurate services which we here at Daysi Jacobson pride ourselves in.
- **Quality:** Daysi Jacobson Accounting LLC is known for its reputation of high standards and expectations that our whole team holds themselves to. At our firm, our primary goal as a trusted advisor is to provide insightful advice to help our clients make informed financial decision. Therefore, we are continuously improving our knowledge and expertise to ensure we provide the best service possible.

## Customer Service above all

Customer service is our number one priority at Daysi Jacobson Accounting. Unlike many other accounting firms or services, we take pride in getting to know our clients and providing education and guidance throughout our process. We know you are trusting us with your finances and critical information, so our goal is to help you feel comfortable and confident through the entire process. You can depend on us at any time. We are here for the long-term and happy to help!

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Make your dreams come true with the Peace of Mind that a team of experienced professionals, and decade-long former IRS Revenue Agent can offer you.

**Hundreds of clients share their dreams with us.**







## Who is Daysi Jacobson?

Daysi Jacobson is a seasoned finance and accounting professional with over 10 years of experience as an IRS Auditor and extensive international exposure. Her career has been marked by excellence in tax compliance, financial reporting, and regulatory oversight, enabling her to guide individuals and businesses in both U.S. and global financial environments.

A graduate of the University of North Florida (UNF), Daysi combines her strong academic foundation in finance and accounting with practical auditing expertise to deliver precise and reliable guidance. Recognized for her integrity, professionalism, and global perspective, she continues to leverage her knowledge to empower clients and communities across borders.



- ✓ Stress-free Tax and Accounting Services
- ✓ We give you Peace of Mind
- ✓ We bring you Solutions.

**Daysi Jacobson Accounting, helping you succeed!**

## Client Reviews

“

I had Daysi Jacobson Accounting do my taxes for the first time this year after my old accountant retired - and I was nervous about starting anew. I was thoroughly impressed with her knowledge, efficiency, and easy processes to upload documents to prepare for the meeting. I highly recommend her; my taxes were done quickly, and it didn't feel like the burden it's been in other years.

“

I was looking for someone who would answer my questions and almost everyone I reached out to didn't seem competent in my situation until I meet with Daysi and her team. They were professional and very knowledgeable. Her insight into my situation made me feel like she has known me my entire life. It was the best decision I made to have her handle my taxes. A+

“

Daysi and her associates are absolutely incredible. So patient and so knowledgeable, they have been a true blessing for my business when I needed it the most.



**Daysi Jacobson**

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818 North A1A Suite 304 Ponte Vedra Beach, FL 32082



(904) 285-1040



(904) 469-7978



Info@jacobsonaccounting.com

Schedule a consultation now!

To learn more scan the QR code  
or visit [www.daysijacobson.com](http://www.daysijacobson.com)

