

Tax Advisory Services For Medical Practice Owners & 1099 Providers

Build a practice that runs profitably, efficiently, and tax-smart. At Oakwood Summit, we collaborate with our strategic partners to provide expert financial services tailored to your needs, including tax resolution, tax planning, payroll, bookkeeping, tax filing, and wealth building. Our experienced team works with individuals and small businesses across the country, offering customized solutions to manage your finances effectively and help you achieve long-term financial success.

Comprehensive Financial Services Designed For Your Practice

At Oakwood Summit, we understand that running a medical practice requires focus on patient care—not financial complexity. That's why we've designed a complete suite of services to handle every aspect of your practice's financial health, from daily bookkeeping to strategic tax planning that protects your wealth for years to come.



Tax Filing

Accurate, timely filing that maximizes deductions, minimizes liabilities, and ensures IRS compliance for complete peace of mind.



Payroll

Seamless payroll solutions managing wages, withholdings, and compliance with state and federal regulations.



Bookkeeping

Detailed, organized financial records that provide clarity and enable informed decisions for practice growth.

Strategic Planning Services That Protect Your Wealth

Tax Planning & Mitigation

Proactive tax planning is the key to minimizing your liabilities. Our experts work closely with you to create a customized tax strategy that reduces your tax burden and optimizes your financial situation throughout the year. We don't wait until tax season—we help you plan strategically all year long to protect your wealth and secure your future.

Wealth Building

Build your financial future with our wealth building strategies. From retirement planning to investment advice, we offer personalized services designed to help you grow and protect your wealth. Whether you're just starting your practice or looking to expand, we'll guide you every step of the way toward financial independence.

Tax Resolution

From resolving IRS debt and handling back taxes to negotiating settlements and securing penalty abatements, we provide personalized solutions designed to address your unique tax challenges. We ensure a stress-free process and help you achieve the best possible outcome for your financial situation.

Advisory Services Packages

Choose from our customizable tax planning packages designed specifically for medical practice owners & 1099 providers. Each package delivers tailored solutions for tax reduction, compliance management, and wealth building to fit your unique financial needs and practice size.

VIP Package

- Front of the line service with priority access
- Priority tax preparation
- Monthly tax planning consultation included
- 24-hour response guaranteed
- Payroll & bookkeeping services
- Dependent tax return preparation
- 1099's & W-2's, annual reports, payroll audits & sales tax included

Advisory Package

- Quarterly tax planning consultation included
- Monthly financial check-ins
- Convenient Tax Dome correspondence with our team
- Payroll, bookkeeping & tax preparation included
- 1099's & W-2's, annual reports, payroll audits & sales tax included

Unique Tax Strategies & Comprehensive Financial Solutions

At Oakwood Summit, our tax partners specialize in offering tailored tax reduction strategies, helping medical practices and 1099 providers legally reduce their tax liabilities—sometimes even down to zero. We focus on unique solutions that ensure long-term financial success, from minimizing taxes by \$50K or more to building sustainable wealth.

\$50K+	100%	24hr
Average Tax Savings	Nationwide Service	VIP Response Time
Our clients typically save \$50,000 or more annually through strategic tax planning	Proudly serving medical practices and small businesses across all 50 states	Priority clients receive guaranteed responses within 24 hours

As your one-stop tax & financial advisory solution, we offer comprehensive financial services including payroll, bookkeeping, and tax planning. Our personalized service ensures every client receives the attention and expertise they deserve, with dedicated support for both short-term needs and long-term financial goals.

Our tax partners specialize in reducing tax burdens for small businesses, ensuring they pay as little as legally possible. We use proven methods to leverage deductions, credits, and tax-saving strategies to help your practice thrive financially.

Tailored Financial Solutions To Help Medical Practices & 1099 Providers Thrive

At Oakwood Summit, we understand the unique financial challenges medical practice owners & 1099 providers face. Our services are designed to provide customized solutions that help medical professionals reduce taxes, stay compliant, and improve their financial health while you focus on patient care.

Tax Reduction Strategies

Our tax partners specialize in helping medical practices & 1099 providers reduce tax liabilities using proven strategies. We develop customized plans that minimize your tax burden, ensuring you keep more of your hard-earned revenue for reinvestment into your practice and long-term growth.

Comprehensive Financial Services

Oakwood Summit offers full financial services including tax filing, payroll, bookkeeping, and tax planning. Our comprehensive approach simplifies your practice finances, enabling you to focus on patients while we ensure financial health, compliance, and operational efficiency.

Ongoing Tax Planning

With proactive tax planning, we help medical practices prepare for future financial needs. Our strategies focus on minimizing liabilities, maximizing deductions, and optimizing long-term wealth building so you can grow your practice confidently.

Frequently Asked Questions

What services does Oakwood Summit offer?

Oakwood Summit & their strategic partners provide a comprehensive range of services, including tax filing, tax planning, payroll management, bookkeeping, tax resolution, and wealth-building strategies. Our goal is to help medical practice owners & 1099 providers navigate complex financial challenges, reduce tax burdens, and achieve long-term financial success.

What makes your tax reduction strategies unique?

Our tax reduction strategies are tailored specifically to each medical practice's needs. We focus on legal methods to reduce tax liabilities by up to 50% or more. By combining tax planning and wealth-building strategies, we ensure long-term financial health for your practice.

How can your payroll services benefit my practice?

Our full-service payroll solutions handle all aspects of payroll, from tax withholdings to filing. We ensure compliance with state and federal regulations, freeing up your time to focus on patient care while reducing administrative burdens and compliance risks.

Ready To Take The Next Step?

Schedule a brief, no-obligation consultation to determine whether our approaches would create meaningful value for your specific situation. During this focused conversation, we'll discuss your current practice structure and profitability, maximum annual contribution and tax deduction potential, guaranteed retirement income projections with zero market risk, and tax savings opportunities tailored to your medical practice.

[Schedule Your Consultation](#)[Learn More About Our Services](#)

Oakwood Summit

Retirement • Tax • Estate • Wealth Strategies for Medical Practice Owners

Ready to keep more of what you earn and build the freedom you deserve?

 www.OakwoodSummit.com

 info@oakwoodsummit.com

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