

QuickBooks Mastermind Live Series with James Griner

Housecall Pro is hosting a QuickBooks Mastermind Live Series with Housecall Pro Certified Partner and QuickBooks Expert, James Griner. These classes will be held **every Thursday at 9am PT/ 12pm ET via Zoom**.

Here are ALL of our class recordings and topics:

***Please note, we've skipped a few Thursdays due to the holidays, etc.*

#001 11/12/20 - Why have HCP and QBO integrated together

Key Topics:

- Why should you add HCP onto your QBO and how it helps you
- Why you should add QBO onto you HCP and how it helps you
- What information does each program provide you
- How to best utilize both programs together

Recording:

<https://www.youtube.com/watch?v=w1BClbcwVHE&list=PLtOkEN3J3qWsEBImMmDfWISKRwFttK1U0&index=1>

#002 11/19/20 - What happens in QBO when you do something in HCP Part 1

Key Topics:

- Adding Customers
- Adding Jobs
- Finishing Jobs
- Modifying Jobs
- Invoicing Jobs
- Receiving Payments

Recording:

<https://www.youtube.com/watch?v=tuZ1wGYrhVQ&list=PLtOkEN3J3qWsEBImMmDfWISKRwFttK1U0&index=2>

#003 12/3/20 - What happens in QBO when you do something in HCP Part 2

Key Topics:

- Deleting/ Changing payments
- Deleting/ Canceling a job
- Attachments
- Notes
- Making changes to customer info

Recording:

<https://www.youtube.com/watch?v=MyeLleAxAEo&list=PLtOkEN3j3qWsEBImMmDfWISKRwFttK1U0&index=3>

#004 12/10/20 - Preparing for end of year taxes

Key topics:

- Checking Sales
- Checking Expenses
- Checking Wages
- Checking Adjustments (depreciation, interest expense, amortization)

Recording: <https://tryhousecall-1.wistia.com/medias/3to4508n6h>

#005 12/17/20 - Charitable contributions and holiday discounts

Key topics:

- How to record charitable contributions for the best tax benefit
- Recording discounts to customers for the best tax benefit

Recording: <https://tryhousecall-1.wistia.com/medias/wwou3kf54r>

#006 1/7/20 - Credit card deposits between HCP and QBO

Key Topics:

- How credit card refunds go over

- Why they go over how they do
- Why not to delete or modify certain things
- When you may have to do a manual recording

Recording: <https://tryhousecall-1.wistia.com/medias/o6gwn8ly7o>

#007 1/14/20 - Credit card refunds between HCP and QBO

Key topics:

- How a credit card refund is handled
- How to record the refund
- How to record a negative bank deposit

Recording: <https://tryhousecall-1.wistia.com/medias/mr9olwf525>

#008 1/21/20 - Product and Service Mapping

Key Topics:

- Line items in HCP and how they communicate into QBO
- Mapping to your P&L accounts
- Moving old services
- Adding new services
- Quick tax setup

Recording: <https://tryhousecall-1.wistia.com/medias/a7hv25ge1n>

#009 1/28/20 - How to use the bank feed

Key topics:

- Double check your deposits
- Double check your checks and bill payments
- Setting rules and regulations to who should do what in the system
- Adding from the bank feed
- Reviewing the bank feed
- Reconciling the bank feed

Recording: <https://tryhousecall-1.wistia.com/medias/dwkkd2zfzn>

#010 2/4/21 - Taxes 2.0, Covid Edition

Key Topics:

- Covid Specific Tax
- Finding Savings for you
- Reinvesting for the future
- Potential changes in 2022

Recording: <https://tryhousecall-1.wistia.com/medias/dekjgigikv>

#011 2/11/21 - Credit Card Disputes

Key Topics:

- Ways to Avoid
- How to record in QBO
- Steps to avoid future issues

Recording: <https://tryhousecall-1.wistia.com/medias/q96k30pp0p>

#012 2/18/21 - Credit tracking for customers

Key Topics:

- Should you provide in house credit
- What happens if a customer defaults
- What if a customer chooses to not get a refund?
- How do you track that in HCP

Recording: <https://tryhousecall-1.wistia.com/medias/kmc6nv4ygk>

#013 2/25/21 - Purchase orders

Key Topics:

- How to number them
- How to keep Track of them
- Next steps after recording them

- Other Options?

Recording: <https://tryhousecall-1.wistia.com/medias/kvr2isnix>

#014 3/4/21 - Receiving Tips Through Housecall Pro

Key Topics:

- Credit card tips
- How to correct credit card tips in your books
- Cash, check, or other tips
- How to pay those tips out to employees

Recording: <https://tryhousecall-1.wistia.com/medias/pylnrg78m3>

#015 3/11/21 - Class Tracking from HCP

Key Topics:

- What is class tracking and when should it be used?
- How to setup classes
- Ensuring your products and services are ready
- Making adjustments for class tracking

Recording: <https://tryhousecall-1.wistia.com/medias/bykavgun3j>

#016 3/18/21 - Employee Compensation Tracking with HCP

Key Topics:

- Gusto Payroll
- QBO Payroll
- Assigning time to a customer in QBO
- Tracking employee benefits
- Tracking different types of compensation in your COA

Recording: <https://tryhousecall-1.wistia.com/medias/nw4og76py7>

#017 3/25/21 - S-Corp Election: Does it make sense?

Key Topics:

- What are the tax benefits or detriments for an S-Corp Election?
- What are the legal benefits and detriments for an S-Corp Election?
- What changes do I need to make in running my business?
- How will it affect my personal taxes?

Recording: <https://tryhousecall-1.wistia.com/medias/iypftrr0sz>

#018 4/1/21 - Cleaning up Your Housecall Pro Account**Key Topics:**

- Checking for errors and verifying
- Checking open invoices and collecting
- Checking Canceled Jobs
- Checking Unscheduled jobs
- Checking Service Agreements

Recording: <https://tryhousecall-1.wistia.com/medias/a2kvf3yyj5>

#019 4/8/21 - Closing out QBO Accounts Receivable**Key Topics:**

- Checking undeposited funds
- Checking QBO Accounts Receivable Report
- Tips
- Duplicate Payments
- Canceled invoices/jobs
- Checking out customer credits
- Making a collections plan
- Writing off bad debt

Recording: <https://tryhousecall-1.wistia.com/medias/pjc2inmatk>

#020 4/15/21- Closing out QBO Accounts Payable**Key Topics:**

- Review open bills

- Review vendor credits
- Review Accounts Payable Report
- Overpayments
- Unknown credits
- Bad entries
- Confirm balances with vendors

Recording: <https://tryhousecall-1.wistia.com/medias/9n5wubua6b>

#021 4/22/21- Entering In Expenses

Key Topics:

- Adding receipts from Hubdoc receipt system
- Adding checks
- Adding additional expenses from the bank feed
- Matching from the bank feed

Recording: <https://tryhousecall-1.wistia.com/medias/5f4rncy4ky>

#022 4/29/21- Reconciling the Accounts

Key Topics:

- Reconcile Bank accounts
- Reconcile Credit Cards
- Reconcile Cash App/Venmo

Recording: <https://tryhousecall-1.wistia.com/medias/8wirlaa6y9>

#023 5/6/21- Making Corrections

Key Topics:

- Expensing Interest Charges
- Expensing depreciation
- Calculating owners draw/contribution
- Expensing amortization
- Expensing prepaid expenses
- Resolving prepaid income

Recording: <https://tryhousecall-1.wistia.com/medias/ptaj2ivp60>

#024 5/13/21 - Reading a Profit & Loss (P&L)

Key Topics:

- Comparisons
- Income
- Cost of Goods Sold (COGS)
- Expenses
- Other Income
- Other Expenses
- Net Profit

Recording: <https://tryhousecall-1.wistia.com/medias/1v03sf3qox>

#025 5/20/21 - Reading a Balance Sheet

Key Topics:

- Comparisons
- Assets
- Liabilities
- Equity

Recording: <https://tryhousecall-1.wistia.com/medias/0b63sygwrw>

#026 5/27/21 - Reading a Statement of Cash Flows

Key Topics:

- Comparisons
- What does it mean?
- What does it tell you?

Recording: <https://tryhousecall-1.wistia.com/medias/vg75m2ip9h>

#027 6/3/21 - What's a QuickBooks ProAdvisor?

- When it comes to accounting, the term 'ProAdvisor' tends to get thrown around. In this class, James is going to go over exactly what the QuickBooks ProAdvisor program is about, what it means to be a ProAdvisor, and why you as a business owner should care.

Recording: <https://tryhousecall-1.wistia.com/medias/06k2cyzezi>

#028 6/10/21 - What Does Housecall Pro 'Certified Partner' Mean?

- Housecall Pro has a Certified Program Partner Program. But, what does that mean exactly? In this class, James, who's an HCP Certified Partner himself, will explain what it takes to become one, why it's beneficial to work with one, and why it matters to you as a business owner.

Recording: <https://tryhousecall-1.wistia.com/medias/whbfhajf9g>

6/17/21 - BREAK

#029 6/24/21 - Why Working With Someone Who Specializes in Your Industry Is Beneficial

- When it comes to taking your Home Service Business to the next level, there are a TON of resources out there! Whether you're looking to improve your Search Engine Optimization (SEO), trying to capture more customer reviews, or grow your social media following, there is likely an expert who's willing to show you the ropes. James is here to teach you why working with someone who specializes in the trades is beneficial + more!

Recording: <https://tryhousecall-1.wistia.com/medias/noo5jb062x>

#030 7/1/21 - How To Find and Know You Have the Right Bookkeeper

- When it comes to taking your Home Service Business to the next level, there are a TON of resources out there! Whether you're looking for a Bookkeeper who's familiar with QuickBook Online, QuickBooks Desktop, FreshBooks, or any of the other

accounting software out there, there is likely an expert who's willing to assist you and show you the ropes. James is here to teach you why working with someone who specializes in the trades is beneficial + more!

Recording: <https://tryhousecall-1.wistia.com/medias/qt47jkgsd>

#031 7/8/21 - Job Cost Tracking: Part 1

Key Topics:

- HCP in app job costing
- QBO Projects
- Starting Projects
- Setting up payroll

Recording: <https://tryhousecall-1.wistia.com/medias/vyu1uqad21>

#032 7/15/21 - Job Cost Tracking: Part 2

Key Topics:

- Assigning Expenses
- Assigning invoices and payments
- Running Reports

Recording: <https://tryhousecall-1.wistia.com/medias/9t0p50gbei>

#033 7/22/21 - Chart of Accounts (COA) Overview

Key Topics:

- What is a Chart of Accounts (COA)?
- What are COGS (Cost of Goods Sold) and how should I consider COGS?
- Types of accounts on a COA

Recording:

https://us02web.zoom.us/rec/play/mrwt26321QuRTodx1wN-ZFI4J1GOVqFjbMROzZf1QMeasjQQGkG7Rr-gv_XXd9V3Y7nBN7CjeoWiZH1g.2jPJlKQ_v25UPcOoC?autoplay=true

7/29/21 - BREAK

#034 8/5/21 - Intro to Budgets

Key Topics:

- What is a budget?
- Ways to budget
- Where your numbers should come from
- Why you should have more than one budget

Recording: <https://tryhousecall-1.wistia.com/medias/ohm4fqagcs>

#035 8/12/21 - Intro To Budgeting Software

Key Topics:

- QuickBooks Online
- Live Plan
- Why a budget is more than numbers, it's a plan
- Why you must compare your P&L to your budget

Recording: <https://tryhousecall-1.wistia.com/medias/6v8nu160jn>

#036 8/19/21 - Developing a Budget With QuickBooks Online

Key Topics:

- Developing a budget from scratch
- Basing your budget off of a prior budget
- Developing multiple budgets
- Running comparisons between budgets

Recording: <https://tryhousecall-1.wistia.com/medias/afdgbb3de2>

#037 8/26/21 - Connecting Live Plan With QBO and Starting Your Budget

Key Topics:

- Connecting Live Plan
- Mapping accounts
- Reviewing historical data
- Starting a budget with Live Plan

Recording: <https://tryhousecall-1.wistia.com/medias/0emzqd1984>

#038 9/2/21 - Working on Your Business Plan in Live Plan

Recording: <https://tryhousecall-1.wistia.com/medias/kimdk4dm7n>

#039 9/9/21 - Setting up Benchmarking Statistics in Live Plan

Recording: <https://tryhousecall-1.wistia.com/medias/rx2lmcfuvvm>

#040 9/16/21 - Creating Your Budget in Live Plan

Key Topics:

- Reviewing your finished budget
- Comparing to actuals
- Utilizing the budget and comparison tools going forward
- Starting your next budget

Recording: <https://tryhousecall-1.wistia.com/medias/zf2e3y401j>

#041 9/23/21 - Leveraging the Data That Live Plan Provides Monthly in Addition to Your Normal Bookkeeping

Recording: <https://tryhousecall-1.wistia.com/medias/l13kjm855z>

#042 9/30/21 - Q3 Tax Close Out Questionnaire

Recording: <https://tryhousecall-1.wistia.com/medias/07efhfb50m>

#043 10/7/21 - New Vehicles (What To Do Before You Go to the Dealership)

Recording: <https://tryhousecall-1.wistia.com/medias/qum9mg9z0c>

#044 10/14/21 - New Vehicles (What To Do While at the Dealership and What to Avoid)

Recording: <https://tryhousecall-1.wistia.com/medias/wdfqu93qg3>

#045 10/21/21 - COA: What Is It, Why Is It Important, and How Should I Set It Up?

Recording: <https://tryhousecall-1.wistia.com/medias/9djxz3lbyi>

#046 10/28/21 - COA Balance Sheet Accounts

Recording: <https://tryhousecall-1.wistia.com/medias/o9gsnxknsn>

#047 11/4/21 - COA Profit and Loss Accounts

Recording: <https://tryhousecall-1.wistia.com/medias/hz7idsdr91>

#048 11/11/21 - What Does the IRS Really Care About on Your COA?

Recording: <https://tryhousecall-1.wistia.com/medias/sko44ib1zg>

#049 11/18/21 - Employee Benefits and Taxes

Recording:

https://housecallpro.zoom.us/rec/share/ycoZr0xp_3wY17cVX_HYOAngwqQU2pR48FFTaMGxHb00Dv4PvmVaO6FD9HRznu7-.tb1WeQhHyUkqDphH?startTime=1637254772000

11/25/21 - BREAK

#050 12/2/21 - What is COGS? Pt. 1

Recording:

<https://zoom.us/rec/play/IRUYmlxh-kl-Uvj-2CnqpOvjIpyYluvxgL1o4qdfnwOMnd18bJcJwpNyhCgMEd4LjieTKdQ-OOo8iE2m.toeTmn0t1Afl8hvA?autoplay=true>

#051 12/9/21 - What is COGS? Pt. 2

Recording:

<https://us02web.zoom.us/rec/play/Fxm2ECopB2JUg8ofPnrPb5WdlMcitQb5pXL7OsmUv27aecbDeRyiWfv7vf0-wD6tXwGwhNKJ2oRNKt.F10dj3DEilzieDNa?autoplay=true>

#052 12/16/21 - Breaking Down Your COA To Get Key Numbers Grouped Together

Recording:

<https://zoom.us/rec/play/4kfCBpD1St5YyM0qkZODcz-3okRxyl5ak10iokooWfJxA94JfjyVhbTQEGG7QlniceIK8QT64GTuBtl.2VMw4Y5PGoUoBpS6?autoplay=true>

12/23/21 - BREAK

12/30/21 - BREAK

#053 01/06/2022 - Reading Overhead Off of a P&L From Your COA

Recording:

https://us02web.zoom.us/rec/play/lqamGE4orwfNBW7Lg-tvzbjCU9DcPkbdnQORhFPtRSeIV1URcAzS6svm64N-DJFotQQseZaGMofOS_19.IWAH5rII2-Gt5ij?autoplay=true

#054 1/13/22 - 1099 Filing

Recording:

https://us02web.zoom.us/rec/play/s7aUnvEjR3Po5moSRtVHSJpSTnAS_srVRyxLKt2y_6T8vHyWO8cEFX28p1DqJqA2Pf6xuEQHJrziYC4v.W7hjol60OwMMhXC-?autoplay=true

#055 1/20/22 - Prepping for Taxes

Recording:

https://us02web.zoom.us/rec/play/4acNr_BH0PukzhcxPj8HvQo2nvTqb5zAZ7m6xx8gsi68AWjTC5QBKKpAMOYzQpQeleDTNWovc7O1uyF6.5NfZhOtnZHilBCww?autoplay=true

#056 1/27/22 - Do I Owe Sales Tax?

Recording:

https://zoom.us/rec/play/8V8rQxFAiMnV42zKTqiRH1jCkoUmCSAkNcPpa3cKe1hNkG_1s0KHf8hjYnmAVh4LBhfGsSFh6NHGR7I6.CtrE4BpDH_FdDOja?autoplay=true

#057 2/3/22 - How to Setup Sales Tax in HCP and QBO & Sales Tax Reporting in QBO

Recording: <https://tryhousecall-1.wistia.com/medias/oq02zl7nk5>

#058 2/10/22 - Why do my HCP sales not match my QBO Sales?

Recording: <https://tryhousecall-1.wistia.com/medias/61rnxovnwe>

#059 2/17/22 - Employee Time Off Options

Recording: <https://tryhousecall-1.wistia.com/medias/ftv9jfwgey>

#060 2/24/22 - Employee Time Tracking with QuickBooks Time

Recording: <https://tryhousecall-1.wistia.com/medias/aix85d6bvz>

#061 3/3/22 - Employee Time Tracking with Gusto

Recording: <https://tryhousecall-1.wistia.com/medias/zifna7fqog>

#062 3/10/22 - Assets

Recording: <https://tryhousecall-1.wistia.com/medias/j2kkm9rm6c>

#063 3/17/22 - Liabilities

Recording: <https://tryhousecall-1.wistia.com/medias/509kvse1cf>

#064 3/24/22 - COA Balance Sheet Accounts Equity

Key Topics:

- Stock
- Owners Equity
- Partnership Equity
- Opening Balance Equity
- Estimated Taxes
- Retained Earnings

Recording: <https://tryhousecall-1.wistia.com/medias/l9uz69khpX>

#065 3/31/22 - Balance Sheet Review

Recording: <https://tryhousecall-1.wistia.com/medias/hr87r3bgab>

#066 4/7/22 - Segment Usage in Housecall Pro

Key Topics:

- Multi-Day Jobs
- Reschedules/Revisits
- Change Orders
- Progress Billing
- Deposit Billing

Recording: <https://tryhousecall-1.wistia.com/medias/ldyis9ql6o>

#067 4/14/22 - Taking Deposits With Housecall Pro & QuickBooks

Recording: <https://tryhousecall-1.wistia.com/medias/bsns5n5qfl>

#068 4/21/22 - Tracking Deposit Liabilities With Housecall Pro & QuickBooks

Recording: <https://tryhousecall-1.wistia.com/medias/i1o8m89bby>

#069 4/28/22 - New Housecall Pro Features & Integrations Pt. 1

Recording: <https://tryhousecall-1.wistia.com/medias/mn50qba9qf>

#070 5/5/22 - New Housecall Pro Features & Integrations Pt. 2

Recording: <https://tryhousecall-1.wistia.com/medias/o2z3idqh10>

#071 5/12/22 - Discounts and Refunds Between QuickBooks Online & Housecall Pro

Recording: <https://tryhousecall-1.wistia.com/medias/eufosc77q3>

5/19/22 - BREAK - NO CLASS

#072 5/26/22 - Advanced Discount Tracking with Housecall Pro & QuickBooks Online

Recording: <https://tryhousecall-1.wistia.com/medias/316nzigz6k>

#073 6/2/22 - How An S-Corporation Can Save You Money

Recording: <https://tryhousecall-1.wistia.com/medias/1xezjwzzh4>

#074 6/9/22 - Why Does My Income Not Match Between Housecall Pro & QuickBooks Online?

Recording: <https://tryhousecall-1.wistia.com/medias/84gulbqn9i>

6/16/22 - BREAK - NO CLASS

6/23/22 - BREAK - NO CLASS

#075 6/30/22 - Data Security With Online Systems

Recording: <https://tryhousecall-1.wistia.com/medias/wa4fre0sah>

#076 7/7/22 - Q2 Tax Close Out & Considerations

Recording: <https://tryhousecall-1.wistia.com/medias/d9snr6aaqx>

#077 7/14/22 - Job Costing: Direct Labor

Recording: <https://tryhousecall-1.wistia.com/medias/yrn8kg013t>

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7/21/22 - BREAK - NO CLASS

Registration Link: N/A

#078 7/28/22 - Job Costing: Benefits

Recording:

https://us02web.zoom.us/rec/play/lcl8V5xC6kJGxWlzFNm0SCD-dTrV0upbwe2Q8MClmTmg2II_D0Bp6tb1phRmzAhBMNxYQ7beITHxa0VB.DOKrXSrnoulv1K2O?autoplay=true

#079 8/4/22 - Job Costing: Indirect Labor

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

#080 8/11/22 - Job Costing: Material

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

#081 8/18/22 - Job Costing: Overhead

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

#082 8/25/22 - Job Costing: Reports

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

#083 9/1/22 - Inventory Introduction

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

#084 9/8/22 - Inventory Methods

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

#085 9/15/22 - Inventory Systems For Accounting

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

#086 9/22/22 - Inventory Systems For Tracking

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

#087 9/29/22 - Short Term Debt

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

#088 10/6/22 - Long Term Debt

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

10/13/22 - BREAK - NO CLASS

Registration Link: N/A

#089 10/20/22 - Business Planning Series Introduction

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

#090 10/27/22 - Your Opportunity

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

#090 11/3/22 - Your Target Market Analysis & Your Advantages

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

#091 11/10/22 - What Are Your Goals?

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

#092 11/17/22 - Your Team & Partners

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

11/24/22 - BREAK - NO CLASS

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

#093 12/1/22 - Sales & Marketing

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

#094 12/8/22 - Your Marketing & Sales Plan

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

#095 12/15/22 - End Of Year Tax Prep

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

12/22/22 - BREAK - NO CLASS

Registration Link: N/A

12/29/22 - BREAK - NO CLASS

Registration Link: N/A

2023 - Money Mastery

Rebrand Begins

#096 1/12/23 - Tax Prep

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

Recording Link:

https://housecallpro.zoom.us/rec/share/Cy1htREQaU1gOrhihv8Xd8BCHtRW0nEsqMa_iP_WKUCp4nzQ0CAZ8yPvCmXgOKZ2.B9peNRKZBSyiFfgK

#097 1/19/23 - Tax Filing Prep

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

Recording Link:

https://housecallpro.zoom.us/rec/share/Cy1htREQaU1gOrhihv8Xd8BCHtRW0nEsqMa_iP_WKUCp4nzQ0CAZ8yPvCmXgOKZ2.B9peNRKZBSyiFfgK

#098 1/26/23 - Week 1 - Money Flow for Accounting Income 🌊💰

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

Recording Link:

https://housecallpro.zoom.us/rec/share/lpgsGWA702s2hPbPwpISxE9Z48R72k28pIMJlzPoQHlq_PXCJgFHVkcKKPIYXB6p.7JQfvqN-ONTNTAn1

#099 2/2/23 - Week 2 - Money Flow for Accounting Income 🌊💰

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

Recording Link:

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#100 2/9/23 - Week 3 - Money Flow for Accounting Income 🌊💰

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

Recording Link:

https://housecallpro.zoom.us/rec/share/NDYSoUk5cLgcdqa5GLXo-i7yE6gUkeN0EzLtUUn_tPcUoGp895uDRhbeAbGnr_ap.8b-iRTelAbDJnbEe

#101 2/16/23 - Week 4 - Money Flow for Accounting Income 🌊💰

Registration Link:

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Recording Link:

https://housecallpro.zoom.us/rec/share/XlgdJvix1HBtW6R4lhQL8GPMb9BUNBG1Sqc54DM3LBpuMVLj5USoWzlhWnTdWUfz.92vgl_-0KAJH4pm5

#102 2/23/23 - Week 1 - HCP <> Quickbooks Online Integration Review

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

Recording Link:

https://housecallpro.zoom.us/rec/share/rKjzj9uKVV6ehTrQ9vd5cFay_ISH0UyqGXeCl3PdmTdcaCDxOX62lyuBSSJtCY8.IDr49nBeeSy57prq

#103 2/23/23 - Week 2 - HCP <> Quickbooks Online Integration Review

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

Recording Link:

<https://housecallpro.zoom.us/rec/share/HQan3H2ppZPdUYSyNIQdXijlukWP7-AlgfMOztQG9TdgiwiSJSKmj9EFzIALhZXp1.Q8Epm-Kz9L7kxC3f>

#103 3/2/23 - Week 3 - HCP <> Quickbooks Online Integration Review

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

Recording Link:

<https://housecallpro.zoom.us/rec/share/HQan3H2ppZPdUYSyNIQdXijlukWP7-AlgfMOztQG9TdgiwiSJSKmj9EFzIALhZXp1.Q8Epm-Kz9L7kxC3f>

#103 3/23/23 - Week 4 - HCP <> Quickbooks Online Integration Review

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

Recording Link:

<https://housecallpro.zoom.us/rec/share/cm4lnG8jf3042lJfI9xulXSPU0ZQphzyxRSYmjgfAhvnFGogex6zt-YGfvdBY8aW.84OULr-s8--liH4f>

#103 3/30/23 - Week 5 - HCP <> Quickbooks Online Integration Review

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

Recording Link:

https://housecallpro.zoom.us/rec/share/zy87jmoa-DV9m2GF2h_8Q7nqllrnb0LtIS4U-fFmNXyeVHZmUbe2xVORQH_Cdmc.CDELQryy37mS4klf

#104 4/20/23 - Week 6 - HCP <> Quickbooks Online Integration Review

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

Recording Link:

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#105 4/27/23 - Week 7 - HCP <> Quickbooks Online Integration Review

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

Recording Link:

https://housecallpro.zoom.us/rec/share/iNa5Xdd3M_13tR6CCjTb1Z85FyZLZCiSDWodVty324KsWYvDO_ICBI7C5KmADRd3.iZaseC0Yu8d5S5En

#106 5/4/23 - Week 8 - HCP <> Quickbooks Online Integration Review

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

Recording Link:

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#107 5/11/23 - Week 9 - HCP <> Quickbooks Online Integration Review

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

Recording Link:

<https://housecallpro.zoom.us/rec/share/hM3B9hBSybyvMi4Y2kiKN522JfapUWKyamczGW-e pDrsmemoQLv0aicXnHZ4E.dyl8iilcR7vkTgv6>

#108 5/18/23 - Week 10 - HCP <> Quickbooks Online Integration Review

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

Recording Link:

<https://housecallpro.zoom.us/rec/share/xrWWfDYIF0I49TYailKAzK9vARy7ZvjBg2FKdrj21mt5 Ld6HnMgAlmmMnH7krTKB.DqLgPOnXALmSsXZP>

#109 5/25/23 - Week 11 - HCP <> Quickbooks Online Integration Review

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

Recording Link:

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#110 6/1/23 - Week 11 - S-CORPs

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRJGwl2-7-hv8sg

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#111 6/8/23 - Payroll Options

Registration Link:

https://us02web.zoom.us/webinar/register/WN_bIMz84ULRjGwl2-7-hv8sg

Recording Link:

https://housecallpro.zoom.us/rec/share/oOUltqH_jvEylCjF9uyEbdPvRBri62qNNAfqbo2XtRhntqNDnf-LpiAHU6H3yPmu.w-pGjY7Pg-eGSgSi

#112 8/3/23 - Inflation

https://housecallpro.zoom.us/rec/share/xqfy5nfCPzcvQX41nEjeso_4FoZk8yfE1jJZNIWD2K_ETXRSSauX-JHq4EhrtEfD.CIFeqC9vmSg9rCQp

#113 8/10/23 - Economic Slowdowns

<https://housecallpro.zoom.us/rec/share/3QDDOvNHphb5oXGa3OSiGSbfFA0ndNjJ5qzCIA6ofQfkAlpjETknOhrXpVjwpGb6.jGQ4Sz-3Fw9iKKXo>

#114 8/17/23 -Economic Slowdowns

<https://housecallpro.zoom.us/rec/share/BhqSnVMsw6bLt4TdQBLdFxollQDoPZNwWnBRj3xDX8xb6N-TvnKtI97X6oIM1iFL.58STDIUEp-5pjK90>

#115 8/31/23 - Economic Slowdowns

<https://housecallpro.zoom.us/rec/share/-ZiqSOGUJyKxjMOIm1Xa5yWCbZoy5vET2kSqHXoAfuxE6kFNLTNb-2mOB7FRLZu8.2RIZvBw32zoitjZt>

#116 9/7/23 -Audits

https://housecallpro.zoom.us/rec/share/aWK2OlcRuhbxhDYU1NbQakMfTcigNVv8J5JbJl0yyLjXlGh_rGcRIGX4ljk0KjEV.2PhXLi26hOUwJbJB

#117 9/14/23 - Audits

<https://housecallpro.zoom.us/rec/share/nUegtSuxB3gpCltZKMmfqoLOL4f8VKSfOLJFLmFbbIhIRtb0XE0EDbrODPmBOWOx.6OJc3kD1BNWKWx-s>

#118 9/21/23 - Audits

https://housecallpro.zoom.us/rec/share/Nrrtl-1X36GW4zKdLXYS6tbljFmhEdm0cGUdC4fjPOG5wHj36V7p4x7_7qpYdc6H.nkzwPhPFKmHQsqXa

#119 10/5/23 - Audits

https://housecallpro.zoom.us/rec/share/LRij2zx_vDJWEnav4DuVV9u_ze8tGbBd0bnK36CX-NKkiEqQclu9Rn_smdCAwlbY.0Jwe2G5Kt-8tLmul

#120 10/12/23 - Investments

https://housecallpro.zoom.us/rec/share/fjfn8is0-Bv9dL8DGCjcY7bAK8qTZDWq-N4jOybHr02v_Izotn-OIBksYz3Xsb65.y2qui2SLKrM9Ih9R

#121 10/19/23 - Investments

<https://housecallpro.zoom.us/rec/share/l0z2YnOlV0KnjN83UEaj6RqpOg2LPbX3qrDAB-GT6Tqf5rl7EvWIHZPVAsAt-xEf.ncg2pYpwynVdLeTT>

#122 10/26/23 - Investments

https://housecallpro.zoom.us/rec/share/2YLA_sj5gm0WvpOx9ApehGNq6v4cDDXBmkd-o-w9NIEGKjx-GiWHJ1zhzPT0SsfG.CVAi3eUrLApSUMIz

#123 11/9/23 - Investments

<https://housecallpro.zoom.us/rec/share/lkwWdM22GNpEu2xfwwod1hR5kKgFB0cidb-uc2qmihT2XSG9a3k8mjTzmy6HeTaV.sJA4-ZS09z2xWr1r>

#124 11/16/23 - Year End Wrap-Up + Prep for Tax Season

https://housecallpro.zoom.us/rec/share/xG-efdZYJ35y_XpLsYbVmDY3pHhwSNX4kkzjVHFj6SMYqtWEDAWGo5wr4NqhuNnT.HylrEek-BChpLCs4

#125 11/30/23 - Year End Wrap-Up

<https://housecallpro.zoom.us/rec/share/1d1zxwYkwtvRYmF4P5QLi84aDSFyNrsuyGkkA3dtdfhByWeOCmHRBwak4XCldNG1.j2KvdaeiC5Kjqhh1>

#126 12/7/23 - Year End Wrap-Up

https://housecallpro.zoom.us/rec/share/L0011srn3rbm9fDbTo8QmoNJWqhXE4_Iti7A1pFkj6-ojOM1CDMuEmsEBYXEQ1AX.iKbi_HTu2fdZ57Pq

#127 12/14/23- Year End Wrap-Up

https://housecallpro.zoom.us/rec/share/Ctz0ToQ3HKPjpWw_Uw3fjWz246yloXQWXdeKsZulfcP9Si9MBqGvSvnYTh4UUCOS.WK5pn05H2Og-oA6t

2024 & 2025 - Monthly Cadence Begins:

January 2024 (#128): The Truth Behind Social Media Tax Hacks

https://housecallpro.zoom.us/rec/share/I70pa6OCH2Uv-KuxYeWnXHxEjbOSMBwZXNVqCxGUjbXoYigipxwikcL_cfOPsELV.LgTUe4Khum5rB5Ld

February 2024 (#129): Fall in Love with Compliance: Understanding New 1099 Regulations  

https://housecallpro.zoom.us/rec/share/3_VtkdwoegeGt2ZB_oLsmaW1j1BnoMbOARCNl-gdd4gaZxTuWeaY44A8FhmP1UD3.DZFaH537TzAHkwdY

March 2024 (#130): Beneficial Ownership Information Reporting

<https://housecallpro.zoom.us/rec/share/xQwloLvsbh1sOWagnyC7urZGACkdBXOHafIa5AJBxFtRIIHTXm4vX9PIhbXPgeQJ.H3E2ZDX-J2aTqblz>

May 2024 (#131): Non-Compete Clauses and Changing the Salary Threshold for Exempt Employees

<https://housecallpro.zoom.us/rec/share/ZQznZemiWsWYFlslh1dsjzAQfuuPkAXKlmyA7HmZBwREeV0I9woK9VyD4f6w38Tq.13VkDzYX2Cq8yu99>

June 2024 (#132): Business Growth & Financial Outlook for 2024 Mid-Year Check

<https://housecallpro.zoom.us/rec/share/gudHx5TsbBZR9ZhRB55K3Lk-Y3nFfLqv0iLYSeZCjcCp7eSA7d-dsi8FtcZNhUcF.McuVxubY0CrAfEMK>

July 2024 (#133): Updates to QBO and QBD

https://housecallpro.zoom.us/rec/share/oTUmOTJAj9ZpGpE89ZXOs-XW7067DXZYosESVssZ_X-8FFUoY9L_2FW0cVdcAep2.z4m-45A1CBxCHAEv

August 2024 (#134): Buying + Selling Your Business Deep Dive

https://housecallpro.zoom.us/rec/share/P-Db37_dTWNWOmHppnzbo1uB29LlIonrw5m015pnusthex7gKRT_PQ9ioMVG4THV.JlLvOfy3CK8HU1ZY

September 2024 (#135): Buying + Selling Businesses (Part 2)

https://housecallpro.zoom.us/rec/share/kkQr1qhKfW0y8Qu0IXuv97Z_Hb9xjPQxao1OAI4CJzdiPND-xQuJSJkdCP7IrvH.wwKHv6Zxd6xe50sZ

November 2024 (#136): Preparing for End of Year & Getting Tax Ready

https://housecallpro.zoom.us/rec/share/mK6PNy1PXFrlluYiW4arZ8biZ-JH_RaiK7cLQUaBUlbgp18-PaVq5N1OBi1tjh-q.3HkY9KmeQdOVVoC

December 2024 (#137): Beneficial Ownership Information Reporting

<https://housecallpro.zoom.us/rec/share/rVmCPXYovB0utHiCvfmU4kPPrIPBNrT7OV7ulExtSM9XTROTRFPunI7DYFhtLc.7AGjolxAcktDFSxH>

January 2025 (#138): Prep for Taxes

https://housecallpro.zoom.us/rec/share/Hi2qJFRJQrfpAETw7QuXjC1b_pkVZCWyfmhPIFtMt6_ZPyzG5F42sQfya5raRVgr.OHj039jrDhbMOFzd

February 2025 (#139): Equity and Tax implications for LLC's Partnerships, S-corps, and C-corps

https://housecallpro.zoom.us/rec/share/coscVRPki-V_PsoiPY-SDMcD48_hd53BEyqmlTAETNOHxE53UjD_OVizTFmWNMlC.nom8-8HvB9yfdz7w

March 2025 (#140): Equity and Tax implications for LLC's Partnerships, S-corps, and C-corps (Part 2)

<https://housecallpro.zoom.us/rec/share/Ok71P-QexlC4CwcOdjM3gCvXM2UGyCmfg5WzxFX1C9Y8bPbWWt3SU08LQlbn7EEed.amOWQJCjNZG34SZS>

May 2025 (#141): What are certified and reviewed financials?

https://housecallpro.zoom.us/rec/share/95YO9lI8zG7Rch5oGdhUEnUNn5GL_V7qEg1d6wHS7-smXXkTrt4jw4yGjDwFptO.tSNL1Yr9V1LfExFL

July 2025 (#142): Leasing versus buying vehicles + equipment for your business.

<https://housecallpro.zoom.us/rec/share/OkwVKTfoMskRsD2sWKFpHLKrQasIP0nl7lcz0LbXbzzDRL0sva5zE9n-2YiAi-VQ.N6XfYS2FWE8RB4zj>

August 2025 (#143): Big Beautiful Bill Deep Dive

https://housecallpro.zoom.us/rec/share/CETX3muY4hcvH5Gcz7qoOMs41VvV-bx3fEo6aBEu6Kbq_9vaM2US5x3tW8029E4.IE6xGZK ioko00kO