



# CLIENT CASE STUDIES



BUSINESS TYPE	STATE	2020 W-2 COUNT	2021 W-2 COUNT	PPP LOAN RECEIVED	ERTC REFUND
Service and Delivery	OK	213	245	Yes	\$ 1,592,132
Adult Foster Care	FL	111	104	Yes	1,355,589
Engineering Consulting	OH	63	63	Yes	1,110,668
Hardwood Veneer Manufacturer	CA	161	157	Yes	1,081,842
Construction	NM	41	40	Yes	835,216
Amusement Park Ride Creator	FL	43	35	Yes	820,472
Primary Healthcare Services	PA	56	59	Yes	793,423
Manufacturing	AZ	N/A	279	No	724,939
Restaurant	CA	55	55	Yes	615,088
Church	VA	78	75	Yes	590,729
Restaurant	CT	84	108	Yes	563,342
Private School	VA	45	45	Yes	520,852
Restaurant	UT	108	114	Yes	488,287
501c3	TX	104	93	Yes	472,989
Country Club	NY	118	109	Yes	470,446
Restaurant	TX	136	209	Yes	463,937
Restaurant	GA	40	15	Yes	455,629
Construction	IL	90	90	Yes	452,570
Food Services	AR	105	119	Yes	452,414
Hotel/Restaurant	TN	205	244	Yes	437,373
Restaurant	TN	90	90	Yes	430,666
Church	VA	67	69	Yes	423,852
Social Service Non-Profit	VA	35	39	Yes	422,053
Healthcare	GA	27	20	No	410,324
Tree Service	OR	30	37	No	409,291
Electrical Engineering	CA	30	30	No	349,935
Catering	CT	28	15	No	345,052
Restaurant	WA	40	15	Yes	342,604
Brewery/Restaurant	HI	30	56	Yes	320,624

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Restaurant	CT	77	89	Yes	\$ 314,893
Full-Service Restaurant	CA	24	24	Yes	310,674
Restaurant	CA	18	25	No	283,439
Restaurant	MA	58	47	Yes	262,495
Restaurant	AL	50	80	Yes	258,266
Restaurant	NC	123	133	Yes	255,740
Restaurant	CA	26	26	Yes	254,480
Non-Profit	VA	17	22	Yes	249,713
Religious Non-Profit	TX	29	27	Yes	249,077
Metal Fabrication	MI	30	22	Yes	247,200
Restaurant	GA	42	57	Yes	234,633
Church	PA	32	25	Yes	227,703
Hotel/Restaurant	AL	205	244	Yes	213,211
Engineering	AZ	20	15	Yes	210,496
Restaurant	MA	25	20	No	208,400
Restaurant	CA	30	36	Yes	206,075
Restaurant	CA	25	31	Yes	205,426
Restaurant	NY	52	57	Yes	204,125
Restaurant	AZ	20	30	Yes	202,720
Restaurant	CA	15	22	Yes	201,919
Electric Contractor	VA	19	22	Yes	200,893
Driving Instruction	MI	24	22	Yes	193,967
Hotel/Restaurant	AZ	205	244	Yes	190,571
Non-Profit	OH	16	24	Yes	190,554
Architecture	FL	44	44	Yes	187,663
Restaurant/Hospitality	AZ	27	23	Yes	184,880
Restaurant	MT	35	42	Yes	182,301
Restaurant	WI	320	125	Yes	182,011
Rehabilitation Facility	MN	29	41	Yes	181,307
Hotel	TX	38	45	Yes	180,368
Restaurant	SC	25	83	No	173,347
S Corp/Food Service	FL	18	16	Yes	171,371
Security/Asset Protection	PA	15	31	No	170,479
Construction	AZ	11	11	Yes	168,056
Fitness	CA	31	23	Yes	167,525
Restaurant	WI	24	21	Yes	164,236
Non-Profit	TX	24	29	Yes	158,752
Hair Salon	CA	12	10	Yes	157,529
Construction	CA	15	13	Yes	157,372
Healthcare	CA	23	26	Yes	156,876

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Analytical Testing Lab	CA	16	12	No	\$ 156,143
Restaurant	CA	33	27	Yes	153,649
Restaurant	MA	68	58	Yes	153,572
Restaurant	CT	63	81	Yes	152,848
Construction	CA	12	15	Yes	151,800
Construction	FL	14	16	Yes	151,755
Plumbing	PA	16	8	Yes	148,030
Restaurant	AZ	11	15	No	145,974
Restaurant	CA	40	15	Yes	144,930
Fire Alarm Installation	NY	15	15	Yes	144,355
Restaurant	CT	41	49	Yes	143,585
Restaurant	PA	20	20	No	142,183
Hobby Store	CA	19	36	Yes	140,350
Restaurant	PA	35	35	Yes	139,455
Restaurant	AZ	N/A	26	No	138,498
Restaurant	CA	11	13	No	131,638
Retail Furniture	SC	8	7	Yes	131,544
Attorney	FL	7	8	Yes	131,429
Restaurant	GA	12	22	No	128,608
Restaurant	NC	57	51	Yes	127,118
Retail Jewelry Store	FL	17	10	Yes	125,092
Security Consulting	NC	9	8	Yes	125,046
Restaurant	AZ	50	60	Yes	124,459
Church	CA	13	13	No	123,445
Restaurant	FL	34	62	Yes	123,417
Electronics	CA	6	6	Yes	123,240
Restaurant	WA	12	17	No	123,050
Bar/Tavern	NV	20	21	Yes	123,025
Hair Salon	CT	10	9	Yes	121,630
Transportation	VA	9	8	Yes	121,028
Restaurant	UT	22	25	No	120,847
Elementary Education	NY	10	8	Yes	119,398
Restaurant	TX	32	46	Yes	119,131
Collision Repair	IL	25	25	Yes	118,876
Restaurant	MD	10	12	Yes	118,866
Medical	WA	24	19	Yes	118,148
Restaurant	CT	24	12	Yes	113,328
Restaurant	TX	40	40	Yes	112,314
Car Wash	PA	20	20	Yes	112,294
Trade Contractor	AZ	15	10	No	110,773

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Full Service Restaurant	CA	15	18	Yes	\$ 109,970
Manufacturing	NC	N/A	108	No	108,685
Restaurant	SC	48	50	Yes	107,026
Attorney	GA	16	14	Yes	106,676
Hotel	FL	14	18	Yes	105,883
Healthcare	MD	10	10	Yes	105,460
Gym	FL	14	18	Yes	105,066
Religious	NC	11	10	Yes	104,082
Fast Casual Restaurant	CA	36	60	Yes	103,465
Hair Salon	CT	13	10	Yes	102,549
Healthcare	CA	17	17	Yes	102,275
Restaurant	FL	21	60	No	102,082
Transportation	PA	28	23	Yes	100,894
Church	AZ	11	10	Yes	100,483
Non-Profit	CA	N/A	41	No	100,000
Brewery	CA	23	27	Yes	98,111
Dentistry	NV	16	18	Yes	97,375
Non-Profit	CA	8	10	Yes	96,229
Restaurant	IL	13	13	Yes	95,403
Church	GA	15	13	Yes	95,247
Restaurant	NC	48	53	Yes	93,942
Veterinary Hospital	CO	25	23	Yes	93,627
Optical	IL	8	8	Yes	92,040
Restaurant	MO	30	39	Yes	89,824
Pharmacy Healthcare	NY	15	10	Yes	89,033
Retail	TX	21	27	Yes	88,775
Non-Profit	NC	6	6	Yes	88,719
Restaurant	FL	11	11	Yes	88,514
Restaurant	WI	49	48	Yes	88,433
S Corp	NC	11	11	Yes	88,342
Pet Care	WI	7	10	Yes	87,285
Bakery	ID	42	35	Yes	87,188
Healthcare	OK	12	12	Yes	86,608
Offices of Dentists	NM	19	13	Yes	86,369
Restaurant	CA	16	16	Yes	85,254
Restaurant	TX	18	18	Yes	84,514
Elementary Education	ID	19	22	Yes	84,219
Insurance	CA	N/A	15	No	83,136
Restaurant and Catering	PA	25	30	Yes	82,784
Security	AZ	25	25	Yes	82,775

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Church - Non-Profit	CA	12	11	Yes	\$ 81,838
Residential HVAC	CA	10	10	Yes	81,344
Restaurant	WI	24	30	Yes	80,245
Dry Cleaners	TX	9	8	Yes	79,441
Legal	CA	9	7	Yes	78,400
Soap & Detergent Manufacturing	FL	9	9	Yes	77,720
Restaurant	CA	12	15	Yes	77,511
Restaurant	GA	13	13	Yes	77,033
Non-Profit Thrift Store	FL	11	19	Yes	76,163
Manufacturing	TX	18		Yes	76,130
Restaurant	CA	10	11	Yes	75,330
Restaurant	FL	223	198	No	74,722
Quick Service Food Industry	CA	30	37	Yes	74,546
Salon	OH	60	49	Yes	73,937
Restaurant/Manufacturing	PA	8	6	Yes	73,761
Brewery	AZ	15	14	Yes	72,218
Legal	CA	9	15	Yes	71,434
Restaurant	KS	20	25	Yes	71,162
Restaurant	PA	8	10	Yes	71,050
Fine Dining Restaurant	OH	19	21	Yes	70,708
Construction	LA	N/A	9	No	70,161
Food Industry	PA	27	25	No	69,905
Mattress Store	MS	5	5	No	68,980
Restaurant	SC	47	89	Yes	68,958
Restaurant	TX	5	5	No	67,179
Childcare	TX	21	13	No	66,166
Oil and Gas	PA	5	5	Yes	66,036
Childcare	NE	28	20	Yes	65,937
Restaurant	CT	10	10	Yes	65,064
Restaurant	VA	223	198	No	64,835
Retail	UT	N/A	8	Yes	64,642
Residential Remodeling	NY	24	13	Yes	63,140
Dental Office	TX	12	12	Yes	63,044
Restaurant	IL	24	18	Yes	62,928
Restaurant	AR	45	45	Yes	62,724
Restaurant	AZ	10	12	Yes	62,474
K-12 Tutoring	UT	28	24	Yes	62,132
Restaurant	CT	10	10	Yes	61,492
Restaurant	ID	5	5	Yes	60,502
Non-Profit	MA	9	9	Yes	60,259

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Restaurant	FL	14	11	Yes	\$ 59,989
Restaurant	IL	20	20	Yes	59,330
Landscaping	PA	6	5	Yes	58,881
Quick Service Restaurant	AZ	22	22	Yes	58,481
Retail	CA	7	4	Yes	58,200
Restaurant	TX	11	27	No	57,086
Restaurant	PA	20	23	Yes	56,890
Fast Food	IL	14	10	Yes	55,533
Restaurant	AZ	15	15	No	54,929
Non-Profit	NJ	8	8	Yes	54,725
Consulting	GA	16	12	Yes	54,370
Restaurant	CA	26	23	No	54,295
Restaurant	NJ	223	198	No	53,440
Restaurant	SC	23	24	No	52,954
Restaurant	NC	2	17	No	52,627
Service	OK	5	7	Yes	52,511
Staffing	CA	5	5	Yes	51,887
Restaurant	CA	10	15	Yes	51,474
Hospitality	CT	3	4	Yes	50,375
Restaurant	PA	14	11	Yes	50,234
Restaurant	SC	20	20	Yes	50,140
Newspaper	TX	8	9	Yes	50,069
Non-Profit	UT	13	11	No	50,000
Construction	CA	6	5	Yes	49,833
Restaurant	SC	20	20	Yes	49,819
Firearms	GA	7	6	No	49,783
Roofing	MO	19	15	Yes	49,341
Graphic Design	CA	5	6	Yes	49,010
Restaurant	CA	10	10	Yes	48,892
Construction	LA	8	12	Yes	48,430
Restaurant	TX	31	23	No	48,053
Food Services	TX	11	9	Yes	47,632
Restaurant	SC	20	20	Yes	47,031
Hospitality	PA	23	22	Yes	46,599
Property Leasing	AZ	42	39	Yes	46,320
Telecommunications	CA	9	9	Yes	45,995
Retail	FL	17	10	Yes	45,792
Restaurant	SC	10	10	Yes	45,355
Restaurant	NC	15	20	No	44,924
Restaurant	CA	7	10	No	44,493

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Dental Staffing	IL	11	9	Yes	\$ 44,440
Health	MA	2	6	Yes	44,000
Restaurant	SC	19	24	Yes	43,241
Indoor Tennis Club	CA	14	20	Yes	43,209
Staffing Industry	TX	5	7	Yes	41,931
Restaurant	CA	23	24	Yes	41,575
Healthcare	PA	13	13	Yes	41,307
Beauty Services	CA	22	11	Yes	41,271
Dental Health	VA	5	6	Yes	40,224
Dry Cleaning	TX	6	9	Yes	40,161
Restaurant	CA	16	18	No	39,773
Service - Instructional	VA	32	38	No	39,454
Retail Store	TX	5	6	Yes	38,852
S Corp	TX	4	5	Yes	38,332
Restaurant	NV	12	17	Yes	37,993
Restaurant	CA	52	52	No	37,788
Retail	VA	17	10	Yes	37,570
Coffee Shop Cafe	TX	8	8	Yes	37,351
Restaurant	MO	11	15	Yes	37,126
Real Estate	NV	10	8	Yes	37,021
Child Care Center	OK	10	10	Yes	36,102
Restaurant	AL	8	8	No	36,058
Shutters and Shades Sales	FL	20	20	Yes	35,977
Restaurant	PA	106	90	Yes	34,000
Restaurant	AZ	40	40	Yes	33,772
Chiropractic Office	CA	14	16	Yes	33,523
Healthcare	FL	6	8	Yes	33,314
Retail	MN	20	20	Yes	33,230
Coffee Shop	CA	14	23	Yes	32,801
Church	VA	6	6	Yes	32,725
Restaurant	TX	14	12	Yes	32,478
Healthcare	VA	N/A	24	No	32,092
Bakery/Cafe/Food	NM	13	10	No	30,526
Bakery, Retail/Wholesale	GA	10	10	Yes	30,353
Dental Employment Agency	CA	8	9	Yes	30,349
Fitness	TX	24	12	Yes	30,309
Catering	NY	77	66	Yes	29,763
Subway Franchise	PA	9	7	Yes	29,715
Restaurant	NY	5	5	Yes	29,676
Healthcare	CA	9	8	Yes	29,355

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Hotel Staffing	VA	N/A	24	No	\$ 28,806
Manufacturing	TX	18	12	Yes	28,415
Healthcare	TX	4	6	Yes	28,153
Theatre	UT	64	45	Yes	27,893
Managed IT Services	PA	6	4	Yes	27,593
Janitorial	AZ	50	50	Yes	27,422
Transportation	CA	25	20	Yes	27,200
Hospitality	FL	36	33	Yes	26,316
Restaurant	CA	6	6	Yes	26,151
Retail	CA	4	8	No	25,910
Restaurant	PA	13	12	Yes	25,113
Restaurant	AZ	8	12	No	24,574
Supermarket	TX	7	6	Yes	24,151
Restaurant	UT	8	12	Yes	23,749
Healthcare	CA	6	6	Yes	21,828
Restaurant	VA	7	6	Yes	21,612
Sales	TX	24	24	Yes	21,251
Restaurant	AR	32	29	Yes	20,447
Restaurant	SC	8	8	No	20,051
Childcare	FL	20	25	Yes	19,708
Dentistry	MO	14	14	Yes	18,789
Church	NY	5	5	Yes	18,669
Dining Restaurant	AZ	5	5	Yes	17,750
Restaurant	FL	36	29	Yes	17,253
Printer	FL	8	8	Yes	16,917
Gas Station/Convenience Store	TX	19	15	Yes	16,117
Tax Preparation	TX	11	8	Yes	16,036
Retail Jewelry Store	CA	17	10	Yes	15,560
Consulting	FL	7	7	Yes	15,483
BBQ Cleaning, Repair and Installation	TX	14	18	Yes	15,475
Restaurant	NJ	7	18	Yes	15,350
Residential Construction	NJ	5	6	Yes	15,000
Restaurant	FL	20	15	Yes	14,696