

INSURANCE PROVIDERS



Federal and state regulatory demands, increased competition (including via the Internet), and slow-to-change business models can put immense pressure on insurance providers. An experienced CPA can help you plan, transition, and find opportunities from the many challenges insurance professionals face.

Tax Services

- Income tax return preparation and filing, including multi-state taxes
- Cost segregation studies
- Corporate tax planning
- IRS audit support

Consulting Services

- Business planning, financial projections, and budgets
- Business valuations
- Cash flow management
- Entity set-up and organizational structure
- Franchise consulting
- Wealth and succession planning
- Operational and process improvement
- Management consulting
- Ownership transfer planning (buy-ins/buyouts)
- CFO services

Accounting Services

- Bookkeeping services and consulting
- Payroll processing and filings
- Financial statements, reporting, and management reports
- QuickBooks set-up, training, and consulting

Audit & Assurance

- Financial statement audits, reviews, and compilations
- Operational audits
- Internal control reviews
- Employee benefit plan audits
- Fraud investigations and risk management
- Agreed-upon procedures, including cost report certification

Regulatory Services

- Statutory accounting
- Consulting



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