

PROFESSIONAL SERVICES



Professional service providers are somewhat unique. The distinctness of culture and management requires individualized service as it is typically the knowledge, intellectual property, and specific skills of its people that represents a large part of the organization's assets.

Categorized in this industry ourselves, we understand the importance of tax and business planning, cost structure, billing, cash flow, succession planning, and maintaining the day-to-day of a business. Our portfolio of professional clients includes law firms, marketing and advertising agencies, engineering firms, architects, and consultants.

Tax Services

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

Consulting Services

- Business planning, financial projections, and budgets
- Business process consulting
- Business valuations
- Cash flow management
- Entity set-up and organizational structure
- Business purchase, sale, and merger/acquisition
- Wealth and succession planning
- Retirement planning
- 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



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