

Proven Process WHAT WE DO



Client Management HOW WE DO IT





FULL SERVICE CPA FIRM PROVIDING:

- Assurance and Accounting
- M & A Due Diligence and Structuring
- International Structure Planning
- Estate, Trust, and Succession Planning
- Valuation
- Benefits Administration
- Advisory or Analytical Projects
- Forensic & Litigation
- Tax
 - Business
 - Individual
 - Estate/Trust
 - SALT
 - International
 - Payroll

OUR STRATEGIC ALLIANCES



OUR VALUES

- Caring** Approach to how we engage with clients and colleagues. They must know we care, and they must feel it.
- Committed** To the firm, the firm's vision, clients, and colleagues.
- Continuously Improving** To be better, striving to learn more, and to offer more. No cruisers.
- Confident** In ourselves, our colleagues, and our firm.
- Connected** To our surroundings and the world outside the firm; developing relationships and articulating ideas.

OUR THREE UNIQUES

- Proactive** Attentive client managers, backed by a system followed by all, accountable for delivery of our promise.
- Innovative** Practical & efficient approach to delivering solutions instead of a larger firm's bureaucracy/protocol.
- Value-Driven Solutions** Focused on delivering value by solving, not selling.