

Privately Held Companies

A Path to Success

We Understand Owner's Needs

Our professionals understand the importance of tax planning, cash flow, profit enhancement ideas and being able to objectively look at opportunities or obstacles. We provide an unbiased opinion to help you evaluate ideas, assess risk and be a resource to talk to about difficult decisions.

Some Key Benefits We Address Are:

- Profit Growth Objectives & Goal Setting
- Financial Attestation & Reporting
- Business Tax Strategies
- Tax Planning for Credits & Incentives
- Benefit Plan Assessment & Audits
- CFO/Controller Services & Accounting Systems
- Cash Flow Forecasts & Budgets
- Coordination of Payroll
- Fraud, Risk Assessment & Internal Controls
- M&A Due Diligence & Support
- Exit, Transition & Succession Strategies
- Personal Tax, Gifting & Estate Strategies
- Retirement Planning

Goal Setting Strategies

We help clients stay focused on the activities critical to their success. What's your long-term vision? What steps need to be taken to close the gap from where you are today to where you want to be? Our professionals get to know your objectives and develop a plan to reach these goals. We meet with you frequently to measure progress and address any obstacles that may arise.

Operating a Family Run Business?

We can help. They come with a unique set of challenges including interpersonal and emotional issues. Our team is experienced and comfortable working with family run companies, and we can become the independent party needed to help navigate through family related issues.

