

CPAs  
*and Strategic Advisors*



Call us—we can help you target *and* achieve your personal and business goals!

*Strategic Advisory Services*

- Operational
- Financial
- Management
- Acquisitions, Sales and Mergers
- Oil and Gas Opportunities

*Litigation Support*

- Forensic Accounting
- Fraud Examinations

*Accounting Services*

- Financial Statements
  - Audits/reviews/compilations
  - Forecasts/projections
- Personal
- Special Reports

*Tax Services*

- Tax-advantaged Planning and Preparation
- Business Tax Matters
- Individual Tax Matters
- Estate and Gift Taxes
- Payroll, Sales, Use and Excise Taxes
- State and Local Taxes

*Estate and Retirement Planning*

- Transfer of Accumulated Wealth
- Business Succession
- Trusts
- College Savings

*Business Valuations For*

- Estate and Gift Taxes
- Succession Planning
- Buy-Sell Agreements
- Sale of a Business
- Mergers and Acquisitions
- Divorce

*Employee Benefit Plans*

- Audits/Tax Preparation

*Business Development and Team-Building Workshops*

- Making your Business Really Fly
- Towards Awesome Service
- Phone Right
- Customer Advisory Boards
- Team Advisory Boards

*Specialized Industry Knowledge In*

- Manufacturing
- Distribution and Wholesale
- Construction
- Health Care
- Retail
- Service Providers
- Real Estate
- Mining
- Trucking
- Breweries