

Let us Exceed your Expectations.



Auditing & Accounting Services

- Financial Statements – Audits, Reviews and Compilations
- Agreed Upon Procedures
- Projections, Budgeting and Forecasts
- Personal Financial Statements
- QuickBooks® Sales, Consulting and Training
- Bookkeeping
- Not-for-Profit Expertise
- Forensic Examinations

Tax Planning & Preparation

- Tax Return Preparation
- Tax Planning and Projections
- IRS Representation

State & Local Tax Services

- Income/Franchise Tax Planning
- Sales Tax and Use Tax Planning
- Audit Representation
- Unitary Studies
- Nexus Studies

Estate, Gift and Trust Services

- Estate Planning
- Tax Return Preparation
- Trust Accounting and Reporting

Employee Benefit Plan Services

- 401(k) Plan Audits
- ESOP Audits
- Defined Benefit Pension Plan Audits
- Health and Welfare Plan Audits
- Form 5500 Preparation

Litigation Support

- Loss and Damages Calculations
- Strategy Evaluation
- Expert Testimony
- Deposition Assistance
- Forensic Investigations

Valuation Services

To assist with:

- Divorce
- Estate Planning/Gifting
- S-Corporation Conversions and Built-In Gains
- Buy/Sell Agreements
- Shareholder Disputes
- Quantification of Business Damages
- Lost Profits Calculations

Technology Products/Services

- Microsoft Dynamics® GP, SL, CRM Sales, Implementation and Support
- Intacct (Cloud-based Financial Management Software)
- ERP System Implementation and Customizations
- Customer Relationship Management Consulting and Implementation
- Custom Solutions and Application Integrations
- Reporting Solutions: FRx, Crystal, SSRS

