



We have learned there's only one way to earn respect, build trust and produce results. That's by being close to our clients. And there's really only one way to do that. **Face to Face.**

Face to face

EXPERIENCE MATTERS

We take pride in our ability to serve clients both big and small and know that aligning with the right advisors and making smart business choices help pave the way for growth. We want to be your trusted business advisor and we do this with the understanding that your business is likely a large component of your family's financial landscape. None of these parts work independently of each other.

SERVICE THAT DELIVERS

Because we have a vested interest in the success of your business, we're proud to offer business, small business, family wealth, and financial consulting services to help with your total financial picture. Our services include the following:

- Payroll services, including payroll reporting, W2s and 1099s
- Bookkeeping services, including solutions for bill pay and providing bookkeeping safeguards
- Compilations on a monthly, quarterly or annual basis
- Forecasting
- Stock portfolio analysis
- Assistance with banking and insurance relationships
- Tax services for businesses and individuals, including corporate, personal, gift, estate, trust, and investment partnerships
- Insurance guidance through a bid and/or maintenance process to include health, workers compensation, liability, and property

- Rent rolls and delinquency reports
- Planning for acquisitions, dispositions, mergers, succession, gifting, and estate purposes
- Sales and property tax
- Contractor's licenses
- Board or management meeting services, including scheduling and attending meetings, presenting financial information, and providing meeting follow up

STEP BY STEP

With business services, we know our clients intimately and check in regularly. Our commitment to you is to walk with you through the daily operations of your business. Our success is measured by yours.



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