

## CLOSELY HELD BUSINESSES

### WE SEE THE WHOLE PICTURE

WilkinGuttenplan's expertise and breadth of services offers entrepreneurs and the owners of closely-held businesses the opportunity to achieve a wide variety of benefits, including:

- Increasing profitability
- Minimizing taxes
- Improving cash flow
- Increasing financial flexibility
- Enhancing operational efficiency
- Maximizing business value
- Leveraging the value of client relationships
- Realizing operation savings
- Achieving financial security

### SEEING THE OPPORTUNITIES, REALIZING THE RESULTS:

Entrepreneurs have a myriad of business and financial needs. Our expertise and insight integrate the whole picture to address virtually all of a business owner's needs. But it's not just what we offer, it's the approach we use to deliver outstanding value that has built lasting relationships.

We are able to do this successfully because we uniquely balance dual roles as entrepreneurs and professional advisors. This gives us a unique perspective; empathy for the challenges business owners face, as well as an appreciation for, and recognition of, opportunities to be explored and developed. We understand that many closely-held businesses don't have a full or even part-time, Chief Financial Officer which means our clients rely heavily on us to help them realize their business ambitions, while achieving their goals for personal financial security.

### SPECIALIZED EXPERTISE

- **Accounting Software & Systems:** As certified trainers and installers of a number of leading accounting applications, we can provide you with the necessary tools and technology for effective bookkeeping, financial management, reporting and controls.
- **Bank Financing/Negotiations:** We provide more than the required financial information. Through our network of relationships, we facilitate communication with the proper decision-makers to help clients secure the financing that keeps businesses thriving and growing.

### BUSINESS & FINANCIAL ADVISORY SERVICES

- Accounting outsourcing
- Business and strategic planning
- Feasibility studies, forecasting and projections
- Human resource consulting/360° employee evaluations
- Mergers and acquisitions
- Performance evaluation systems
- Risk management
- Sale of business
- Comprehensive tax/financial planning services