

CLOSELY HELD BUSINESSES

WE SEE THE WHOLE PICTURE

Entrepreneurs and the owners of closely-held businesses have a myriad of business and financial needs. At WilkinGuttenplan, we help clients see the whole picture to address virtually all of business needs.

Our expertise, insight, and breadth of services offer the opportunity for your business 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:

It's not just the services WilkinGuttenplan can offer; it's our approach of delivering outstanding value that has built lasting relationships and results for clients. As entrepreneurs and professional advisors, ourselves, it 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 you rely heavily on us to help realize business ambitions while achieving goals for personal financial security.

SPECIALIZED EXPERTISE

In addition, our team provides more than the required services in the areas of accounting applications and financing to help closely held businesses achieve greater success.

- **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