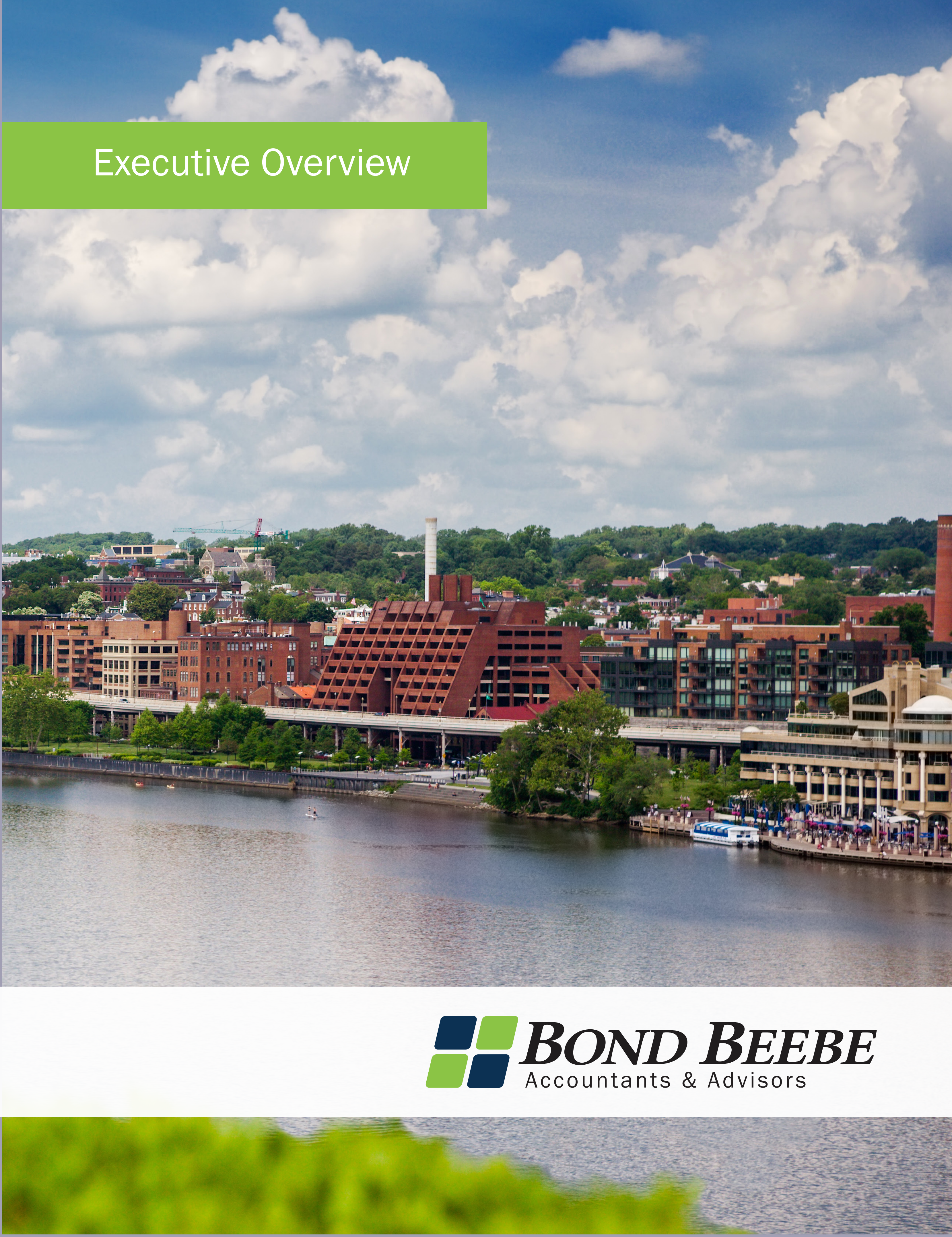
Executive Overview



BOND BEEBE
Accountants & Advisors

Collaboration.

Providing a proactive and open exchange of ideas to manage your needs.

Analysis.

Identifying and tracking key performance indicators that impact performance.

Strategy.

Creating or helping you execute the blueprint to achieve your goals.

We Are **Trusted Advisors.**

Our team has experienced professionals who listen, interpret and provide clients objective insight. We take the time to understand our client's goals and design a strategy unique to their needs. Our firm delivers assurance, tax, accounting and specialized solutions that provide clients with the information to successfully manage their business and everyday lives.

We Are **Tax Strategists.**

We provide tax planning and reporting to individuals, businesses and not-for-profit organizations. Taxes can substantially impact decisions and profitability. Our professionals are trained in complex and difficult to understand issues, including tax incentives and credits. Let us create a tax plan to help you optimize any tax benefits that may exist.

We Are **Your Solution.**

Are you comfortable with your accounting firm? Are they the firm that can take you to the next level or help with a family succession or an exit strategy? Give us thirty minutes. We want to make you excited, not comfortable, about your relationship with your accounting firm.

301.272.6000 | www.bbcpa.com

Gain a Competitive Advantage

Strategic Planning & Gap Management

Our team provides a different set of eyes and an infusion of new ideas. The first step is understanding your strategic plan. Then, we help you close the gap from where you are today to where you want to go by identifying:

- The three to five goals that are most critical to your success.
- Which one of those goals is most important.
- The obstacles blocking or slowing down progress toward those goals.

Navigating the Client Lifecycle

Stages. The Lifecycle has 4 stages; Emerging, Growth, Mature and Transition. Each stage is different and needs change as you move from one stage to the next. Survival and growth strategies may be replaced by complex planning to retain or transfer wealth, mitigate risk, or achieve a different life stage objective. While your accounting firm may have been excellent for the first twenty years, you may need a different firm to help with the next stage.

Direction. The more sophisticated an organization or individual becomes, the more they need advice tailored to their specific situation. We help you proactively move through the different stages, so you can enjoy your life and maximize the value of your business.

Our Clients

Who Are They? They include privately held businesses, not-for-profit organizations, government agencies, employee benefit plans, labor organizations and high-net-worth individuals.

Their Size? Our business clients come from diverse backgrounds. We work with large organizations, a wide range of middle market businesses and selectively support emerging entities.

Our high-net-worth clients are typically people with advanced earning and wealth positions in need of strategic tax support.

Their Location? Our clients are located throughout the United States.

Their Common Needs? Each relies on us to provide direction and advice, while ensuring their tax, accounting and assurance matters are managed.

Our Services

Advisory Support

- Growth Strategies & Goal Setting
- Cash Flow, Billing & Collection Strategies
- Mergers & Acquisitions Due Diligence
- Exit, Transition & Family Succession Planning
- Wealth Management
- Forensic Accounting
- Valuation
- Litigation Support & Dispute Advisory Services
- Bankruptcy, Insolvency & Reorganization

Tax Strategies & Compliance

- Organizational Income Tax Planning & Return Filing
- Tax Projections
- State & Local Tax Support
- R&D Credits, Cost Segregation & Tax Incentives
- International Tax Issues
- Personal Return Planning & Preparation
- Stock Options, College & Retirement Planning
- Estate Plans & Trusts
- Family Gifting & Philanthropic Strategies

Assurance Services

- Audits, Reviews & Compilations
- Employee Benefit Plan Audits (ERISA)
- Payroll Audits
- Agreed-Upon Procedures
- Internal Controls & Internal Audit Outsourcing

Accounting & Human Resources

- Complete or Partial Outsourcing
- Fractional CFO or Controllership
- Temporary or Permanent HR Leadership
- Accounting & HR Project Support
- Recruiting

Personalized Communications

One feature that sets Bond Beebe apart is our client interaction. While many accountants do a good job of handling compliance tasks, such as audit reports or tax filings, Bond Beebe goes the extra mile to become a vital and integral part of your management team. We proactively meet and speak with you throughout the year. This approach to communication enables our firm to make a difference to your goals and bottom line.

Ready To Start The Conversation?

Change is not easy, but the risk of using the wrong CPA firm can be high. Give us thirty minutes to let us make an impact. Contact us to see how Bond Beebe can be the change you need.

301.272.6000 | www.bbcpa.com

301.272.6000 | www.bbcpa.com

301.272.6000 | www.bbcpa.com