



ACCOUNTING, TAX & ADVISORY SERVICES



CBIZ ACCOUNTING, TAX & ADVISORY SERVICES

Our Mission: To enhance our clients' success and offer a distinct business advantage.

Combining innovative thinking with a distinctive personal touch, CBIZ provides services and products that are truly unique... Unique because we listen, obtain a thorough understanding of your needs and then work creatively to provide meaningful and functional solutions... Unique because we take a proactive interest in each client's success.

OUR SERVICES & EXPERTISE

Tax Services

When it comes to tax laws, only one thing remains constant – change. CBIZ tax professionals work closely with you to identify and evaluate tax-planning opportunities and assist in minimizing your income tax burden. CBIZ's extensive experience, timely response and comprehensive range of technical skills allow us to assist with a broad range of tax matters and issues.

Our experts provide quality service in the following areas: corporations, partnerships, LLCs, individuals, estates, trusts and tax exempt organizations.

Tax Planning & Consulting

- Individual – We invest substantial time to understand your goals and objectives in order to minimize personal tax exposure and provide solid guidance.
 - Annual tax liability projection & planning
 - Family estate & gift planning
 - Charitable giving
 - Personal financial planning
 - Retirement planning
 - Stock option consulting

- Corporate – *CBIZ is always just a phone call away!* Whether you require an analysis of a new opportunity or guidance through a planned transaction, we are prepared to assist with the business and tax impact considerations.

- Entity structure
- Cost segregation studies
- Property & sales tax minimization
- State & local tax solutions
- Liquidation planning
- LIFO consulting
- Mergers & acquisitions
- Buy-sell agreements & strategies
- Transactional tax matters
- Foreign Sales Corporation (FSC) consulting
- Employee Stock Ownership Plans (ESOP)
- Impact of new & proposed legislation

- Partnerships & LLCs – Our professionals possess the knowledge and skills to evaluate your entire situation and provide beneficial advice, including **analysis of agreements, structuring of allocations and transactional analysis.**

- Tax Exempt Organizations – We understand the complexities of the tax exempt world and are prepared to provide comprehensive solutions.
 - Application assistance
 - Consultation regarding IRS required reporting to donors
 - UBIT planning & consulting
 - Internal control development, documentation & implementation
 - Assistance with multi-organization structures, including For-Profit Subsidiaries, Foundations & Joint Ventures

Tax Matter Dispute Representation

Once a return has been filed it can be selected for a Federal, state and/or local examination. CBIZ has the experience and expertise to represent you through the entire process.

Complex Tax Transaction Scenarios

We are well-prepared to provide effective advice for structuring transactions, whether the subject is a publicly traded company, large privately held business or middle market family business.

Tax Returns/Compliance

CBIZ assists in the preparation of Federal and state income tax returns.

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|---------------|----------------------------|
| ■ Businesses | ■ Partnerships |
| ■ Estates | ■ Trusts |
| ■ Foundations | ■ LLCs |
| ■ Individuals | ■ Tax exempt organizations |



As your personal advocate, CBIZ is committed to provide you with a significant tax advantage.



Advisory Services

CBIZ's specialized expertise gives you a valuable resource advantage.

CBIZ shares in your pride and vision. To ensure we are able to provide you with a long-term business advantage and valuable solutions for critical issues, CBIZ offers a full spectrum of advisory services.

Business Planning

CBIZ operates upon the premise that a thorough understanding of your immediate needs and long-term goals is the difference between running a business and running a successful business. Therefore, strategic business planning is critical to your success.

CBIZ professionals ask the "probing" questions. Your answers drive the design of an effective business plan. We use our resources to deliver valuable insight, thought-provoking ideas and recommendations that address your company's performance and future.

This process reveals unseen opportunities and provides you with the path to achieve results.

Our approach and commitment provides you with an enduring service advantage.

Estate & Retirement Planning

CBIZ helps manage the array of issues regarding the acquisition and preservation of assets. Our tax planning professionals work with you to establish a well-defined path through the ever-changing maze of personal business and financial issues. Our goal is to ensure your family retains the wealth and assets you have spent a lifetime accumulating.

- Investment & Insurance analysis
- Gift planning
- Education programs for children & grandchildren
- Wealth transfer

Succession Planning

95% percent of all U.S. businesses are closely held or family-owned; yet, 70% fail to make the transition from first to second generation. CBIZ can help your business avoid that statistic.

Specialized Advisory Services

Business Valuation Services

- Business values for transition planning
- Feasibility analysis
- Tangible & intangible asset appraisal
- Fairness opinions
- Divorce
- Gifting programs

Litigation Support

- Expert witness testimony
- Insolvency accounting
- Forensic investigations
- Damage claims
- Fraud & embezzlement
- Marital dissolution

Outsourcing Services

- Accounting & Bookkeeping
- CFO/Controller services
- Human resources

Corporate Recovery Expertise

- Crisis management for troubled businesses
- Problem loan resolution & workout
- Bankruptcy planning, asset management & disposition
- Turnaround & workouts
- Appraisals & auctions

Special Industry Expertise

- Not-for-Profit
- Healthcare
- Construction
- Real Estate
- Law firms & other professional service organizations
- Retail
- Financial - broker/dealers, investment companies, credit unions
- Wholesale distribution
- Manufacturing

At CBIZ, we pledge to be accessible and provide timely, innovative and unique solutions. Our goal is to develop a long-term, mutually beneficial business relationship with you. To this end, we will structure this relationship to balance cost and outcome by attending to both the human and technological elements of your project. Ultimately, our structured approach translates into your financial success.



Your Business
Just Got Easier.



Multiple Services with a Single Focus: Your Success

National Resources;
Personal Service

ACCOUNTING, TAX, &
FINANCIAL ADVISORY

BENEFITS CONSULTING &
ADMINISTRATION

HUMAN RESOURCES

INSURANCE

LITIGATION SUPPORT

M&A/CAPITAL ADVISORY

MARKETING

PAYROLL

PROPERTY TAX

REAL ESTATE ADVISORY

RETIREMENT & WEALTH
MANAGEMENT

TECHNOLOGY

VALUATION & APPRAISAL

Operating a successful business is never simple.

Beyond production or delivery of the service or product your company offers, you have to manage the people and systems that keep it running efficiently and profitably. There are always financial and tax issues, employee benefits and insurance concerns, technology challenges, and numerous other business problems which keep you from focusing on your core business.

That's where CBIZ can help. We are uniquely positioned to assist you with a wide range of professional services and solutions, all with a single focus: your success.

For more information, contact your local CBIZ Advisor or call our toll-free help line, 1-800-ASK-CBIZ (1-800-275-2249).



Your Business Just Got Easier.

www.cbiz.com