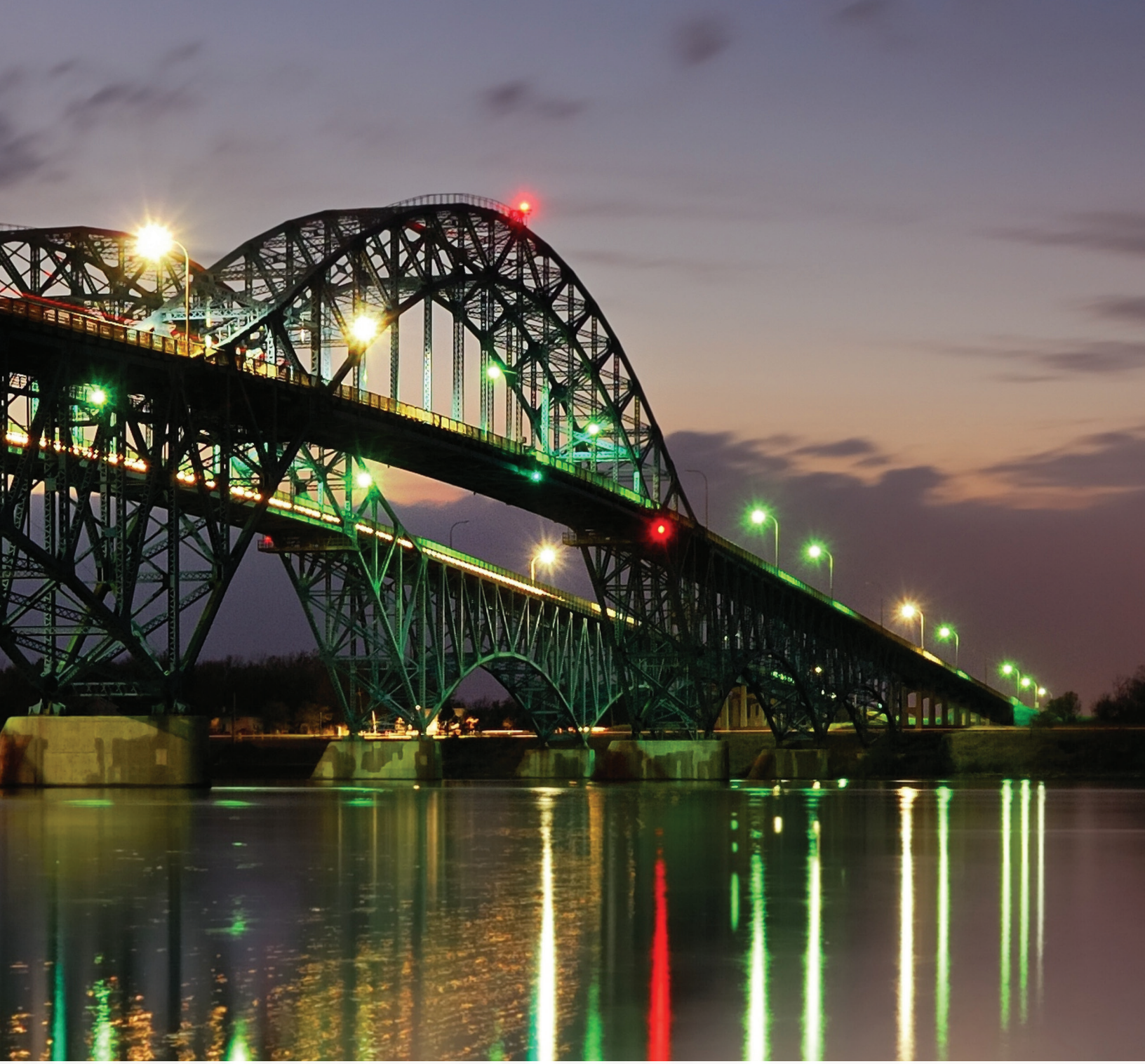


LVBW LLP

Accountants & Consultants

Collaboration.

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

Analysis.

Identifying and tracking key performance indicators that impact success.

Strategy.

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

(716) 204-9000 | www.LVBWCPA.com

We Are **Trusted Advisors.**

Our team listens, interprets and provides clients objective insight. We take the time to understand their goals and design a strategy unique to their needs. Our firm provides clients with the information to successfully manage their business and everyday lives.

We Are **Tax Strategists.**

We provide tax planning, reporting and compliance for individuals and organizations. Taxes can substantially impact profitability. Let us create a tax plan to help optimize your tax position.

We Are **Audit Professionals.**

Our assurance team will provide audited, reviewed or compiled financial statements to help validate the accuracy of information and provide insight, while minimizing risk.

We Are **Your Solution.**

Can your accounting firm 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.

Moving Our Clients Forward

Strategic Planning & Gap Management

We provide a different set of eyes and an infusion of new ideas. The first step is understanding your vision. Then, we help 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 may be replaced by the need 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 successful you become, the greater the need for expert advice tailored to your specific situation. We help you minimize stress and maximize the value of your business.

Exit & Succession. Owners are experienced and seasoned professionals, but an exit or succession is foreign to them. Many have no idea where to start or what timeline is needed to conduct a successful transition. For organizations looking at a sale or a family succession, we can help by strategizing and managing all the steps of the process.

Our Clients

We provide support for privately held businesses, high-net-worth individuals and nonprofit organizations. They vary from emerging entities just getting established, to large organizations with complex needs. Each client has different challenges and their own definition of what is valuable to them.

The core function we provide every client is accurate information, proactive tax planning and a relationship from an accounting firm that understands their business and what is important to their specific goals and obstacles.

The BDO Alliance Advantage

All of the support and depth of an international firm delivered with the cost efficiency and personalized touch of a mid-sized, local firm.

AN INDEPENDENT MEMBER OF

BDO

ALLIANCE USA

Organizational Tax Support

- Business Tax Planning & Return Filing
- Tax Projections
- Multi-state & International Taxation
- Co-Sourced Tax Services
- Research & Development Tax Credits
- Canadian & Cross Border Services

Assurance & Controls

- Audits, Reviews & Compilations
- Agreed-Upon Procedures
- Employee Benefit Plan Audits
- Fraud Prevention & Detection
- Internal Controls

Accounting & Controllership

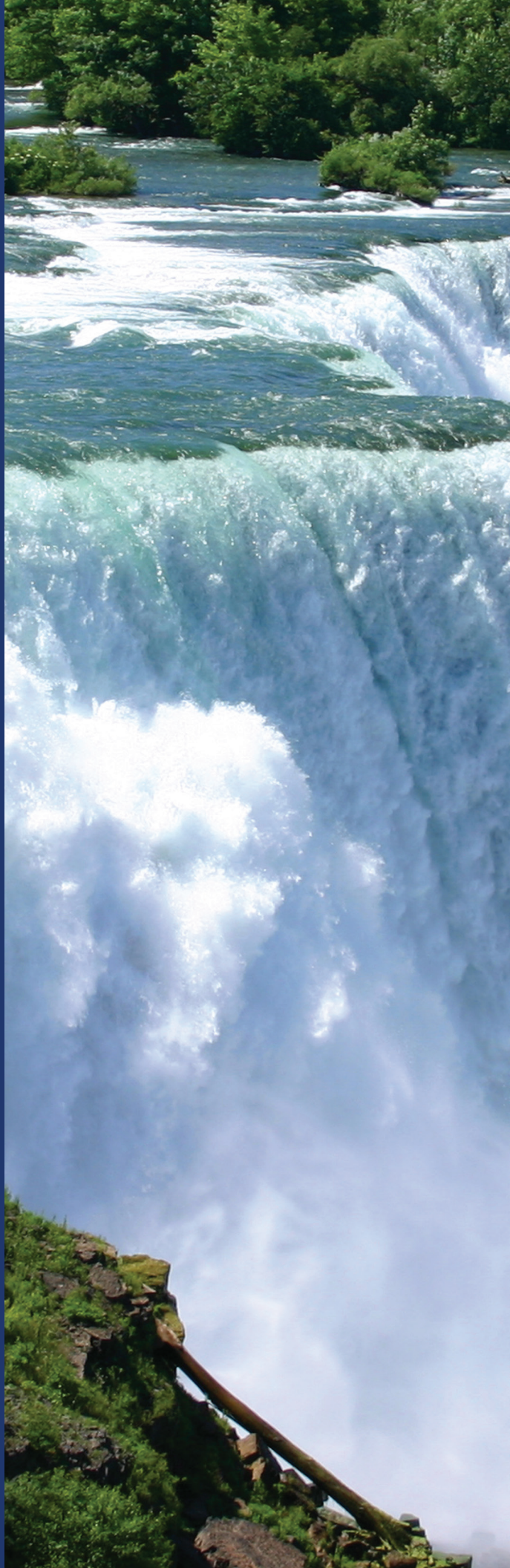
- Complete or Partial Accounting Outsourcing
- Fractional CFO or Controllership
- Financial Forecasts & Projections
- Cash Flow & Budgeting Analysis
- QuickBooks Expertise

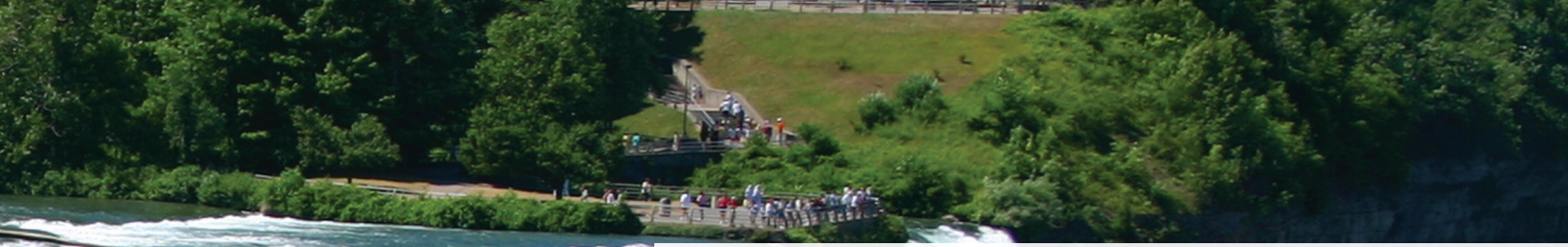
Advisory Support

- GAP Strategic Planning
- Exit, Transition & Family Succession Planning
- Merger & Acquisition Due Diligence
- Medical Benefit Programs
- Business Valuation
- Litigation Support
- Cost Segregation Studies

Individual Tax Needs

- Income Tax Planning & Return Filing
- Educational Funding
- Retirement Planning
- Estates & Trusts
- Philanthropic Gifting Strategies
- Family Wealth Transfers





Make an Impact

We are not a reactive CPA firm. Filing tax returns and developing financial reports are a core function every organization needs, but those items should be secondary to the planning and strategy your accounting team has created with you. Our professionals provide proactive, forward thinking services. We will assist in your thought leadership initiatives and help work toward maximizing the succession of your organization.

Closely Held Businesses

Our role is to help implement an owner's vision, grow and preserve their assets and help them build family wealth. We help owners develop accurate and timely financial reports, create a tax plan and manage their accounting. Our team provides objective insight and counsel. We act as a sounding board to talk through ideas.

High-Net-Worth Individuals

Our tax professionals will create a tax strategy, file returns, assist with estate planning, gifting, trusts and the overall protection of family wealth.

Nonprofit Organizations

We will work in collaboration with your auditor to help close the books, prepare for an audit, become your auditor or outsource all of your accounting.

Start the Conversation

Change is not easy, but the cost of using the wrong CPA firm can be expensive. Give us thirty minutes to show you how LVBW can help make an impact.

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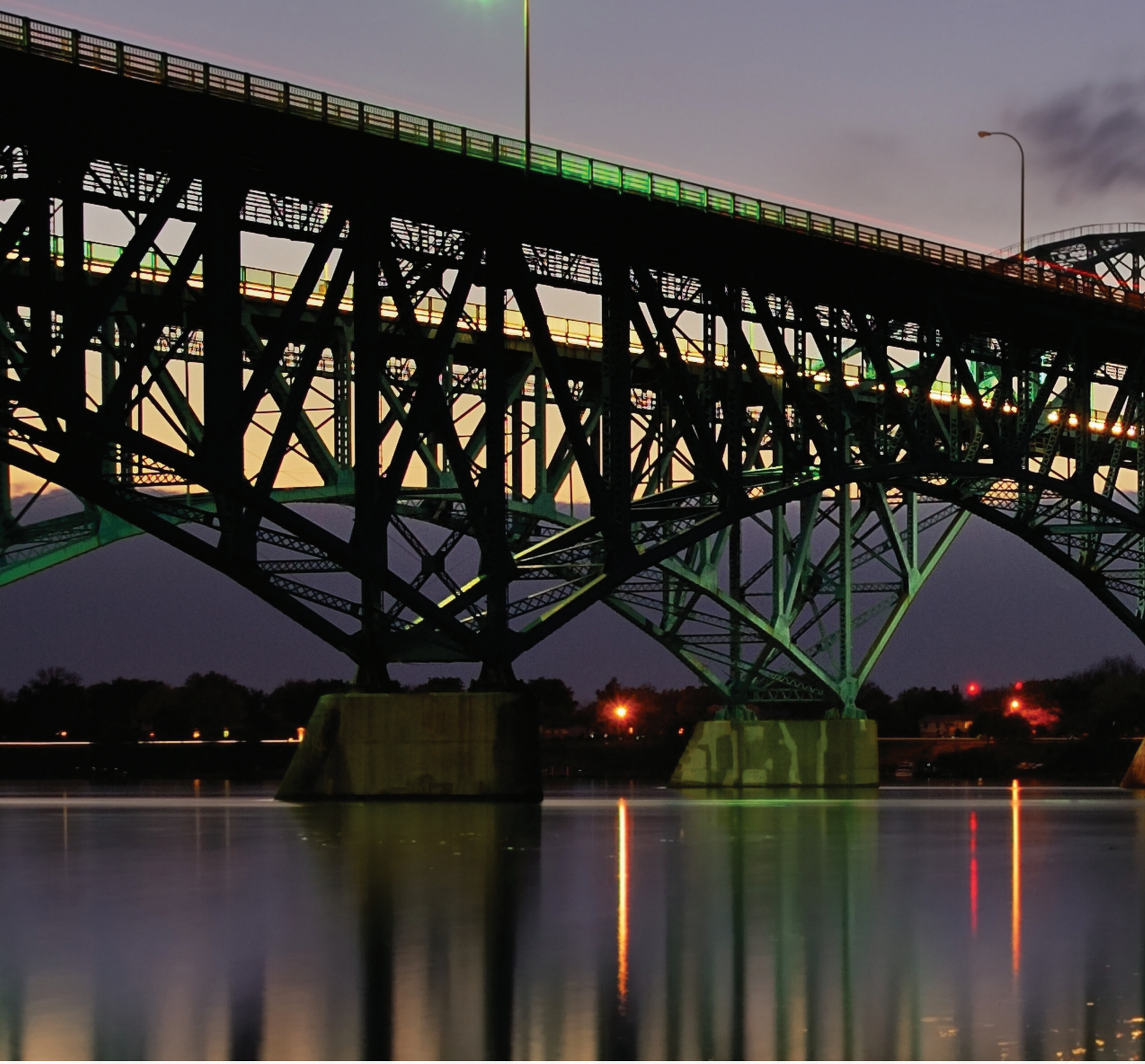

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