Executive Summary

abip

CPAs | ADVISORS

CLIENT **FOCUSED.** RELATIONSHIP **DRIVEN.**

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 execute the blueprint to achieve your goals.

Client **Focused**. Relationship **Driven**.

abip provides clients with the information to successfully manage their business and focus on their objectives. Our team listens, interprets and provides objective insight. We take the time to understand your goals and design a strategy to meet those goals.

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.

Assurance Professionals

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

Advisory Strategists

We help clients make progress toward their goals. Sometimes we are asked to design or evaluate a plan, while others use **abip** to execute and monitor an existing strategy. Our professionals help you stay focused on critical success factors, evaluating opportunities, or eliminating obstacles.

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.

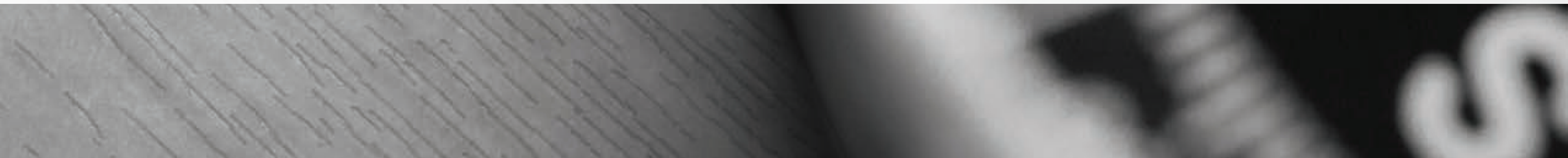
Direction. The more successful you become, the greater the need for expert advice tailored to your specific situation. We help you minimize stress and maximize the value of your business.

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.

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 goals that are most critical to your success.
- Prioritizing your goals.
- Designing and implementing a working plan towards these goals.



Our Clients

We provide support for privately held businesses, high-net-worth individuals, non-profit organizations, and government agencies. 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.

Assurance & Reporting

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

Organizational Tax Matters

- Income Tax Planning & Compliance
- International Tax Issues
- Tax Projections
- Local, Multi-State & Federal Tax Support
- R&D Credits & Tax Incentives
- Cost Segregation

Personal Tax Services

- Personal Tax Planning & Preparation
- Tax Impact of Stock Options & Investments
- College & Retirement Planning
- Estate Plans, Trusts, Gifting & Philanthropic Strategies

Client Accounting Services

- Outsourcing Accounting Functions
- CFO|Controller Leadership
- Bill Payment & Cash Flow Planning
- General Ledger Entries
- Account Reconciliations
- Financial Statement Compilation
- Managing Key Performance Indicators (KPIs)
- Audit Preparation Assistance
- Permanent or Interim Support

Advisory Support

- Growth Strategies
- Goal Setting & Progress Monitoring
- Financial Projections & Analysis
- Business Restructuring
- Mergers & Acquisitions
- Executive Compensation
- Fraud Investigations & Forensic Accounting
- Exit Strategies
- Family Succession Planning
- Valuations

Thought Leaders

Our professionals provide proactive, forward thinking services. Every organization needs tax returns and financial reports, but those should be secondary to the planning and strategy your accounting team has created with you. We provide thought leadership and help work toward maximizing the success of your organization.

Closely Held Businesses

We implement an owner’s vision, grow and preserve assets, and help build and transfer family wealth. Our team develops accurate and timely financial reports, creates a tax plan, and provides objective insight.

High-Net-Worth Individuals

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

Non-Profit 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.

State & Local Government

We support municipal and special purpose governments, school districts, county governments, river authorities and water districts; OMB A-133 audits, state of Texas single audit, comprehensive annual financial reports, internal control reviews, agreed-upon procedures and special projects.

Start the Conversation

Change is not easy, give us thirty minutes to show you how **abip** can help make an impact.