

executive overview



tonneson+co

Executive Overview

tonneson + co is an audit, tax and consulting firm

Our clients range from emerging entities to organizations approaching 1 billion dollars. They include privately held businesses, not-for-profit organizations and publicly traded companies. We support a local, national and international client base.

Some of our executive highlights include:

- ✦ Clients in a dozen countries
- ✦ 50 plus professionals
- ✦ Attest, tax & specialized consulting services
- ✦ M & A transaction experience
- ✦ High net worth individuals reporting & tax solutions

Our international depth

We are members of the Geneva Group International (GGI), which is a global association of accountants, lawyers and consultants who provide support to clients throughout the world. GGI allows us to provide clients with an extended reach into foreign markets with access to local offices and professionals with in-depth experience in each country's accounting, tax and reporting regulations.

Profit refinement ideas and solutions

Our core philosophy is to provide proactive, profit-focused solutions and ideas to empower clients with the information they need to make informed decisions. As your accountant, auditor, tax advisor and consultant we concentrate on achieving the right balance of compliance and strategic direction that adds value at a reasonable fee. As your needs change, tonneson + co has the skills to handle complex matters, breakdown obstacles and evaluate opportunities.

strategic direction
goal setting
profit enhancement
compliance support
tax planning
global support
mergers and acquisitions
corporate finance
succession planning

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Value-Added Solutions

We do encounter the unusual, the infrequent, and sometimes challenging questions and situations. As your trusted advisor we are here to share ideas that we feel have value to your organization and to help you assess opportunities and obstacles that may arise.

Consultative communications and planning are embedded into our thinking. It is sometimes difficult for an owner and his/her executive team to obtain independent, unbiased feedback. Even discussing a concept can be misconstrued and perhaps interpreted as a sign of a pending unfavorable change. Often we take on the role of the initial sounding board to test an idea, as well as provide the first level of feedback on the issue.

Accessible, Responsive Professionals Providing In-Depth Analysis and Direction

Engagement Process

Communications drives our approach to engagements. Our team provides detailed information to help you and your staff prepare the information we will need. When we need to come on site our goal is to minimize the time we spend in order to reduce any potential office disruption. We understand your employees are busy and they have other work that needs to be done.

We deliver compliance and strategic support. All organizations need to ensure their accounting systems, reporting and tax filings are accurate and timely, but that is just part of our job. With each client interaction we seek to provide input when appropriate to suggest possible refinements or alternatives. Our professionals provide a high-level of personalized support because that creates the value our clients deserve.

Services Overview

The following is a partial list of our service potential. If you have a need that you do not see listed, please call.

Assurance & Financial Reporting

- + Audits, Reviews & Compilations
- + OMB A-133 Circular Audits & UFR Compliance
- + Employee Benefit Plan Audits
- + Agreed Upon Procedures & Internal Controls
- + International Financial Reporting Standards (IFRS)
- + Forensic Accounting & Fraud Investigation
- + Financial Forecasts & Projections
- + Accounting Systems & Transaction Support

Tax & Consulting

- + Preparation of Federal, State & Local Tax Returns
- + Sales & Use Tax and Multi-State Tax Issues
- + Business Tax Planning & Deferral Strategies
- + Profit Enhancement Planning
- + Valuation and Litigation & Corporate Recovery
- + Entity structuring; Partnerships, LLC & Other Forms
- + Real Estate; 1031 Exchanges, Lease Analysis

PLUS Services for High Net Worth Individuals

- + Accounting, Reporting & Income Tax Strategies
- + Estate, Trusts & Gifting Strategies
- + Risk Assessment & Life Insurance Evaluations
- + Family Office & Foundation Support
- + Trust Accounting
- + Professional Fiduciary Services

M & A Support for Domestic and Foreign Buyers & Sellers

- + Establishing an Acquisition Team
- + Pre-acquisition Planning
- + Negotiating Price & Analyzing Sale Options
- + Valuating a Company Including Due Diligence
- + Assessing Tax Implications & Employment Issues
- + Determining a Capital Structure
- + Valuation of Partner Interests for Buyout
- + Senior & Mezzanine Debt Financing
- + Venture Capital, Preferred & Common Equity Investments

International Services

- + International Tax Planning
- + U.S. Federal, State & Local Income Tax Returns
- + Trust & Estate Planning for Multi-Nationals
- + Transfer Pricing Issues
- + International Mergers & Acquisitions
- + Creation of Worldwide Business Structure
- + Cross-border Transactions

tonneson+co

t 781.245.9999

f 781.245.8731

www.tonneson.com

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