



# KING-BARRETT LLP

CERTIFIED PUBLIC ACCOUNTANTS AND BUSINESS ADVISORS

Accounting Services • Advisory Services • CFO/Controller Services  
Retirement & Estate Planning • Tax Planning and Preparation • Transaction Services

For more than 25 years, King-Barrett LLP has been serving individuals and business clients in a diverse range of industries throughout the Midwest.

- Dental
- Medical
- Veterinary
- Professional Service
- Real Estate

FINANCIAL  
INTELLIGENCE FOR  
STRATEGIC BUSINESS  
DECISIONS

## **F.A.S.T. PRODUCT**

### **Financial & Accounting Support Team**

Our industry leading F.A.S.T. product delivers state of the art financial and accounting support to allow you to focus on your business. Our F.A.S.T. product provides the following benefits:

**Bookkeeping** – Save time by outsourcing daily accounting tasks to us. We'll take care of bill payments, recording daily deposits, and reconciling your bank statements through secure online portals or office visits.

**Accounting** – Ensure that you always have accurate financial information with our professional support. You take care of paying bills and making deposits, we provide monthly financial statements and reconciliations to your bank statements.

**Business Reporting/Key Performance Indicators** – Make faster, better, and more informed business decisions with our reporting and analysis of business-specific, key performance indicators.

## **ACCOUNTING SERVICES**

Our accounting services provide thorough, accurate reporting and critical analysis that allows you to evaluate your financial health and realize your business goals. Let us be your outsourced CFO team by delivering financial statements and reports and/or handle all your accounting tasks so you can concentrate on running your business.

- Accounting System Setup and Training
- Tax Planning and Preparation
- Cash Flow Analysis
- Financial Statement Preparation and Analysis
- Analyzing Key Performance Indicators ("KPI's")

## **TAX PLANNING & PREPARATION**

We know one of your top priorities is paying less in taxes and avoiding year-end surprises. We work with you throughout the year to develop a customized plan with tax-saving strategies that are tailored to your unique situation.

Our tax services include:

- Federal, State, and Local Income Tax Strategies
- Estate, Gift, and Trust Tax Return Preparation
- Individual and Business Tax Planning and Preparation
- Ensuring Multi-State and Local Tax Compliance

## **ADVISORY SERVICES**

The ultimate goal of most businesses is to increase profitability. By engaging King-Barrett for advisory services we can help you do this, and much more. Our financial experts will work with you to maximize revenue and minimize expenses. We'll help you create a managed environment to allow you to optimize the productivity of you and your team as well as the operational efficiency of your business.

- Profitability Consulting
- Internal Control Implementation
- Practice Management
- Practice Coaching
- Officer & Staff Compensation Analysis

## **TRANSACTION SERVICES**

Your business is likely the largest income-producing asset in your life and selecting the right partner to guide you through a transaction is essential. With a combined experience of over 100 years, including Big Four accounting as well as Investment Banking, our professionals know what it takes to develop a transaction strategy most suitable to your goals and objectives.

- Mergers and Acquisitions
- Valuations and Fairness Opinions
- Succession Planning
- Practice Brokerage
- Financial and Accounting Due Diligence
- Bank & Private Financing Assistance

## **RETIREMENT & ESTATE PLANNING**

At King-Barrett LLP, we specialize in estate, trust, and gift tax matters. Our expert team offers decades of experience helping individuals develop and implement trust and estate plans that enable them to achieve their financial goals.

- Estate Planning and Administration
- Defined Benefit, Profit Sharing and 401(k) Plans
- Trusted Third-Party Administrator ("TPA")