

**CERTIFIED PUBLIC ACCOUNTANTS & CONSULTANTS
SERVING BUSINESSES AND INDIVIDUALS FOR OVER 88 YEARS.**

*Professional service companies look to Windes as the provider...
we listen, consult, and guide our clients to success.*

*Windes and our affiliates are the
8th largest accounting network in the world,
delivering exceptional local value.*



We treat all clients as though each is our only one...

WINDES
AUDIT | TAX | ADVISORY

OUR SIGNATURE STORY

Since 1926, we have been a trusted business partner to our clients and have earned our reputation as one of the most respected and socially responsible accounting firms in southern California. Our professionals deliver high-value accounting and consulting services and are committed to our clients and their organizations. The strength of our practice and comprehensive expertise, coupled with our global network, enables us to provide our clients with business solutions focused on their continued success at fees that represent outstanding value. Windes has 16 partners and over 140 personnel in a variety of disciplines within our three southern California offices. Our firm serves over 2,500 businesses and more than 1,500 individuals.

THE WINDES APPROACH

The majority of our clients are acquired through referrals from existing clients, friends, or business associates of the firm. Many of our client relationships have lasted for generations. Significant partner involvement and low personnel turnover are keys to our success. Given our local decision-making, we are able to deliver our engagement services to meet your needs without using a one-size-fits-all approach.

THE WINDES DIFFERENCE

- ◆ Expertise with professional service companies in a variety of industries
- ◆ Strengths focused on audits, taxes, and the needs of our clients
- ◆ Established in 1926, we have been serving clients for almost nine decades
- ◆ Local technical and engagement decision-making is made with significant partner involvement
- ◆ Strong client relationships and exceptional service
- ◆ A combination of national firm technical expertise with the responsiveness, rate structure, and dedication to client satisfaction that makes our services an outstanding value
- ◆ Global Reach: Our Baker Tilly International Network provides cultural knowledge, expertise, and resources in 137 countries worldwide
- ◆ A separate third-party administration practice with accredited retirement plan experts on staff
- ◆ Acknowledged by *Inside Public Accounting (IPA)* as one of the top “25 Best of the Best” accounting firms in the country and listed as one of *IPA’s* “All-Star Firms for Long-Range Planning”
- ◆ Motivated and hard-working staff: Consistently ranked as a “Best Accounting Firms to Work For” in the country by *Accounting Today*, one of the “Best Places to Work” in Los Angeles and Orange Counties by the *Los Angeles Business Journal* and *Orange County Business Journal*, respectively

INDUSTRY CLIENTS WE SERVICE

- | | |
|--------------------------------|----------------------------|
| ◆ Automotive | ◆ Manufacturing |
| ◆ Construction and Real Estate | ◆ Private Equity |
| ◆ Education | ◆ Professional Services |
| ◆ Healthcare | ◆ Technology |
| ◆ Hospitality | ◆ Transportation and Trade |

WINDES AUDIT & ASSURANCE AND TAX & ACCOUNTING PRACTICE LEADERSHIP



LYLE SCHEPPELE, CPA
 Partner and Chairman
 Audit & Assurance Services
 lscheppele@windes.com

- 35 years of experience
- Specializes in financial statements of public and private companies, both entrepreneurial and mature, business mergers and acquisitions
- Serves clients in a variety of industries, including manufacturing and distribution, construction, and real estate

AUDIT & ASSURANCE SERVICES

Windes offers a variety of personalized audit and assurance services designed to help you with your business opportunities and challenges, including:

- Audits, Reviews, and Compilations
- Audit Committee Advisory Services
- Business Advisory Services
 - Governance, Risk & Compliance
 - Information Technology
 - Financial & Operational Improvement
 - Strategic Services
- Due Diligence
- ERISA Audits
- Financial Consulting and Structure
- Mergers & Acquisitions Assistance
- Sarbanes-Oxley Compliance and Consulting
- SEC Compliance



JAMES A. CORDOVA, CPA, MST
 Partner and Chairman
 Tax & Accounting Services
 jcordova@windes.com

- 22 years of experience
- Specializes in multi-state taxation issues and planning, as well as tax strategies involving real property transactions for middle market companies
- Serves clients in the real estate and construction industries
- Mergers and acquisitions structure planning

TAX & ACCOUNTING SERVICES

We offer a variety of services designed to help you minimize taxes and develop strategic plans to meet your goals, including:

- Accounting
- Business Entity Tax
- Cost Segregation
- Consolidated Tax Returns
- Estate, Gift, and Trust
- Individual Tax
- International Tax
- Mergers & Acquisitions
- Multi-state Tax Returns
- Representation before Federal and State Tax Authorities
- State and Local Tax
- Succession Planning
- Tax Credits

"Windes has been flawless in their responsiveness and deliverables, which speaks highly to the fact that as a regional accounting firm, they are able to provide nimble and cost effective services while incorporating an integrated tax planning strategy between my two businesses.

I highly recommend their services to interested parties."

- CEO of a communication services company

OUR GLOBAL REACH

- ◆ As an independent member of Baker Tilly International, Windes has access to the cultural understanding, knowledge, and expertise our clients need in order to succeed on a global level
- ◆ Baker Tilly International is the 8th largest network of accountancy and business services firms in the world, with revenues of \$3.4 billion
- ◆ Represented by 161 independent member firms with 27,000 professionals in 137 countries worldwide

MEMBER OF

- ◆ American Institute of Certified Public Accountants (AICPA)
- ◆ California Society of Certified Public Accountants (CalCPA)
- ◆ Center for Public Company Audit Firms of the AICPA
- ◆ Public Company Accounting Oversight Board (PCAOB) Registered
- ◆ American Society of Pension Professionals and Actuaries (ASPPA)
- ◆ National Institute of Pension Administrators (NIPA)



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LOS ANGELES

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