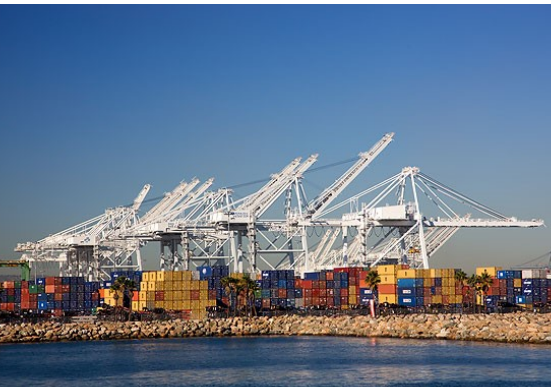


SERVICES FOR THE

# TRANSPORTATION, TRADE & MARITIME INDUSTRIES



## ABOUT US

With more than 90 years of experience servicing companies located in U.S. ports such as Los Angeles, Oakland, Seattle, and New York, as well as ports in China and the Netherlands, we are the premier accounting provider to the transportation, trade, and maritime sector in southern California. Headquartered in downtown Long Beach, minutes away from the ports of Long Beach and Los Angeles, we are uniquely positioned to service this dynamic industry. Since 1926, Windes has been a trusted business partner to our clients and has earned an excellent reputation as one of the most respected accounting firms in California. Windes covers a multitude of disciplines with more than 165 professionals within four southern California offices. Our firm serves over 2,800 businesses and more than 1,600 individuals.

## COMPETITIVE ADVANTAGES

- ◆ 92 years of experience servicing transportation, trade, and maritime clients
- ◆ Firm headquarters located within minutes of the ports of Long Beach and Los Angeles
- ◆ Expertise in terminal operations, container and bulk handling, transportation, and warehousing
- ◆ Comprehensive industry knowledge of port operations with tenants and service providers
- ◆ In-depth understanding of clean energy programs
- ◆ Highly technical service teams are tailored to client's needs with significant partner involvement
- ◆ Clients are industry leaders with local to international footprints
- ◆ Global reach with access to member firms worldwide
- ◆ Highly involved in the ports of Long Beach and Los Angeles

## INDUSTRY EXPERTISE

- ◆ Marine Terminal Operators
- ◆ Cargo Container Handling
- ◆ Drayage Transportation
- ◆ Over-the-road Transportation
- ◆ Third-party logistics
- ◆ Warehousing
- ◆ Stevedoring and Bulk Handling
- ◆ Automotive Discharge
- ◆ Petroleum Distribution
- ◆ Clean Truck Programs

## SERVICES

- ◆ Audit and Review
- ◆ Corporate Tax
- ◆ State and Local Tax
- ◆ International Tax Matters
- ◆ Fuel and Excise Tax Credits
- ◆ Clean Energy Incentives
- ◆ Evaluation of Internal Control
- ◆ M&A Due Diligence
- ◆ Independent Contractor Management

## THE WINDES TRANSPORTATION, TRADE & MARITIME TEAM



**LANCE G. ADAMS, CPA**  
**PARTNER, AUDIT & ASSURANCE SERVICES**  
 ladams@windes.com

- 20 years of experience
- Specializes in audits of financial statements reporting under US GAAP and IFRS and in evaluation of internal controls over financial reporting
- Provides financial statement audit, internal control, and consulting services to middle-market businesses, both domestic and international



**SCOTT J. DIONNE, CPA**  
**PARTNER AND CHAIRMAN, AUDIT & ASSURANCE SERVICES**  
 sdionne@windes.com

- 35 years of experience
- Specializes in audits and preparation, review, and supervision of financial statements
- Practice focus includes privately held businesses and their owners in a variety of industries, including construction, real estate, professional service firms, transportation and trade, oil and gas, manufacturing, and distribution



**SEAN K. MCFERSON, CPA, MBT**  
**PARTNER, TAX & ACCOUNTING SERVICES**  
 smcferson@windes.com

- 20 years of experience
- Specializes in domestic and international taxation issues of multi-national companies, including domestic and international restructuring, tax-efficient integration of acquired targets, developing and implementing intellectual property-migration strategies, US inbound and outbound tax planning, and formation of international entrepreneur structures

## CLIENT REACH

We work with transportation, trade, and maritime companies throughout the U.S. and as far as China and the Netherlands. With more than 90 years of experience in the industry, our in-depth industry knowledge and technical expertise, along with access to member firms worldwide, we can help you maximize efficiencies, minimize taxes, and expand your business nationally and globally.

### WESTERN CLIENT LOCATIONS

- ◆ Bakersfield, CA
- ◆ Fresno, CA
- ◆ Long Beach, CA
- ◆ Los Angeles, CA
- ◆ Modesto, CA
- ◆ Oakland, CA
- ◆ Redwood City, CA
- ◆ Sacramento, CA
- ◆ San Diego, CA
- ◆ San Francisco, CA
- ◆ Stockton, CA

### SOUTHERN

- ◆ Ventura, CA
- ◆ Anacordia, WA
- ◆ Seattle, WA
- ◆ Tacoma, WA
- ◆ Vancouver, WA

- ◆ Corpus Christi, TX
- ◆ Galveston, TX
- ◆ Houston, TX
- ◆ New Orleans, LA
- ◆ Port Canaveral, FL
- ◆ Tampa Bay, FL

### EASTERN

- ◆ Brooklyn, NY
- ◆ Iselin, NJ
- ◆ Wilmington, DE
- ◆ Baltimore, MD
- ◆ Philadelphia, NC
- ◆ Wilmington, NC
- ◆ Norfolk, VA
- ◆ Charleston, SC
- ◆ Rock Hill, SC
- ◆ Savanna, GA

### INTERNATIONAL

- ◆ Hong Kong, China
- ◆ Shenzhen, China
- ◆ Rotterdam, Netherlands

*"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 service 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.
- ◆ With revenues of \$3.4 billion, Baker Tilly International is one of the world's leading networks of accounting and advisory firms.
- ◆ Baker Tilly International is represented by 125 independent member firms with 33,600 professionals in 147 territories 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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