

PROFESSIONAL SERVICES FIRMS

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 services firms 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 more than 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 147 territories 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 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

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 one of the largest network of accountancy and business services firms in the world, with revenues of \$3.4 billion
- ◆ Represented by 125 independent member firms with 33,600 professionals in 147 territories worldwide

INDUSTRY

CLIENTS

WE SERVICE

- | | | |
|-----------------------|-------------------------|------------------------------|
| ◆ Automotive | ◆ Healthcare | ◆ Private Equity |
| ◆ Architectural Firms | ◆ Hospitality & Leisure | ◆ Real Estate |
| ◆ Construction | ◆ Law Firms | ◆ Retail & Consumer Products |
| ◆ Education | ◆ Manufacturing | ◆ Technology & Telecom |
| ◆ Energy | ◆ Medical Practices | ◆ Transportation & Trade |

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
- ◆ Special Reports

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 commend their services to interested parties."

- CEO of a communication services company

MEMBERS OF

- ◆ American Institute of Certified Public Accountants (AICPA)
- ◆ AICPA Employee Benefit Plan Audit Quality Center (EBPAQC)
- ◆ American Society of Pension Professionals and Actuaries (ASPPA)
- ◆ California Society of Certified Public Accountants (CalCPA)
- ◆ Center for Public Company Audit Firms of the AICPA
- ◆ National Institute of Pension Administrators (NIPA)
- ◆ Public Company Accounting Oversight Board (PCAOB) Registered
- ◆ The ESOP Association
- ◆ The National Center for Employee Ownership
- ◆ Western Pension & Benefits Council, Orange County

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