

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
- ◆ 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 Firms to Work For” in the country by *Accounting Today* and a “Best Places to Work” in Los Angeles and Orange Counties by the *Los Angeles* and *Orange County Business Journals*, respectively



OUR GLOBAL REACH

- ◆ As a member of Allinial Global, Windes has access to the cultural understanding, knowledge, and expertise our clients need in order to succeed on a global level
- ◆ Allinial Global is the second largest accountancy services association in the world, with revenues of nearly \$5 billion
- ◆ Represented by 268 member firms with more than 42,000 professionals in 109 countries 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 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

EMPLOYEE BENEFIT SERVICES

Windes Employee Benefit Services provides complete design, documentation, and administration services for employee benefit plans sponsored by small to medium-sized businesses including:

- ◆ Defined Benefit Pension and Cash Balance Plans
- ◆ Cross-Tested Plan Allocations
- ◆ 403(b) Plans
- ◆ Plan Design Consultation
- ◆ Internal Revenue Service (IRS) Representation
- ◆ Profit Sharing and 401(k) Plans
- ◆ Safe-Harbor 401(k) Plans
- ◆ Welfare Benefit Plans
- ◆ Government Correction Program Filing

MEMBERS OF

- ◆ American Institute of Certified Public Accountants (AICPA)
 - ◇ Center for Audit Quality (CAQ)
 - ◇ Governmental Audit Quality Center (GAQC)
 - ◇ Employee Benefit Plan Audit Quality Center
 - ◇ Private Companies Practice Section (PCPS)
- ◆ American Society of Pension Professionals and Actuaries
- ◆ California Society of Certified Public Accountants (CalCPA)
- ◆ National Institute of Pension Administrators
- ◆ The ESOP Association
- ◆ The National Center for Employee Ownership
- ◆ Western Pension & Benefits Council, Orange County

Headquarters

3780 Kilroy Airport Way
Suite 600
Long Beach, CA 90806
562.435.1191

Orange County Office

2050 Main Street
Suite 1300
Irvine, CA 92614
949.852.9433

Los Angeles Office

515 Flower Street
Eighteenth Floor
Los Angeles, CA 90071
213.239.9745