

FIRM OVERVIEW

About Us

Founded in 1926, Windes has grown from a small local practice into one of Southern California's most trusted accounting and advisory firms. Now entering our 100th year in business, we have helped organizations navigate complexity with clarity while providing audit and assurance, tax, client advisory services, transaction advisory services, human capital consulting, and technology and risk solutions designed to meet each client's unique needs.

Grounded in integrity and driven by a commitment to service, our professionals combine deep technical expertise with a forward-thinking approach that empowers clients to operate more efficiently, make informed decisions, and pursue long-term success. Today, Windes serves thousands of businesses, nonprofits, retirement plans, and individuals across the world, delivering value through meaningful relationships, practical guidance, and a steadfast dedication to the communities we serve.

Visit our
website:



www.windes.com

Member of
Allinial
GLOBAL®
An association of legally independent firms

At a Glance

- ✓ **Top 100 Accounting Firm** in the Nation
- ✓ **200+** Professionals
- ✓ **3 Offices:** Long Beach, Irvine, Los Angeles
- ✓ **100 Years** in Business
- ✓ **Best Place to Work**
- ✓ In the past 12 months, we have served over **8,000 clients**

Industries We Serve

- | | |
|-----------------------|----------------------------|
| Automotive | Nonprofit Organizations |
| Construction | Professional Services |
| Energy | Real Estate |
| Healthcare | Retail |
| Hospitality & Leisure | Technology & Telecom |
| Manufacturing | Transportation & Logistics |
| Maritime | Wholesale & Distribution |

Long Beach

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

Irvine

2050 Main Street, Suite 1300
Irvine, CA 92614
949.852.9433

Los Angeles

515 Flower Street, Eighteenth Floor
Los Angeles, CA 90071
213.239.9745

Audit & Assurance

- ✓ Agreed-Upon Procedures
- ✓ Audit Committee Advisory Services
- ✓ Audits, Reviews & Compilations
- ✓ Business Advisory Services
 - Financial & Operational Improvement
 - Governance, Risk & Compliance
 - Strategic Services
- ✓ Due Diligence
- ✓ ERISA Audits
- ✓ Examination Services
- ✓ FAR Compliance
- ✓ Financial Consulting & Structure
- ✓ Internal Control Evaluation
- ✓ OMB Uniform Guidance Compliance
- ✓ Special Reports

Tax

- ✓ Accounting, Payroll & Business Services
- ✓ Business Entity Tax
- ✓ Consolidated Tax Returns
- ✓ Consulting
- ✓ Cost Segregation
- ✓ Estate, Gift & Trust
- ✓ Individual Tax
- ✓ International Tax
- ✓ Multi-state Tax Returns
- ✓ Real Estate Tax Services
- ✓ Representation before Federal & State Tax Authorities
- ✓ State & Local Tax
- ✓ Succession Planning
- ✓ Tax Credits

Advisory

- ✓ **Technology & Risk**
 - Advisory Analytics
 - Cybersecurity Compliance
 - IT Governance
 - Risk Management & Cybersecurity
- ✓ **Client Advisory Services**
 - Business Insights / FP&A
 - Business Process Outsourcing
 - Fractional CFO
 - Fractional Controller
 - Outsourcing Accounting Services
- ✓ **Transaction Advisory Services**
 - Mergers & Acquisitions Strategy
 - Value Acceleration & Exit Planning
 - Wealth Management*
- ✓ **Specialized**
 - ASC 740 Income Taxes
 - ASC 842 Leases
 - Employee Benefit Services
 - Human Capital

*Investment advice is offered through Integrated Partners, a registered investment advisory doing business as Windes Wealth Management, and its registered investment advisor representatives, Mark Mitamura, Whitney Massey, and Tanner Harris. Windes and its individual partners are solicitors to Integrated Partners and are not registered investment advisors. Solicitors do not provide investment advice and are compensated solely for their referral services.

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