

## What Accounting Services Can We Provide for Your business?

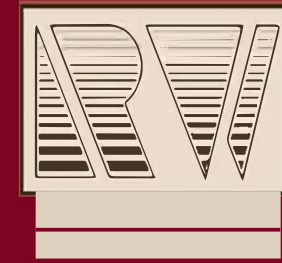
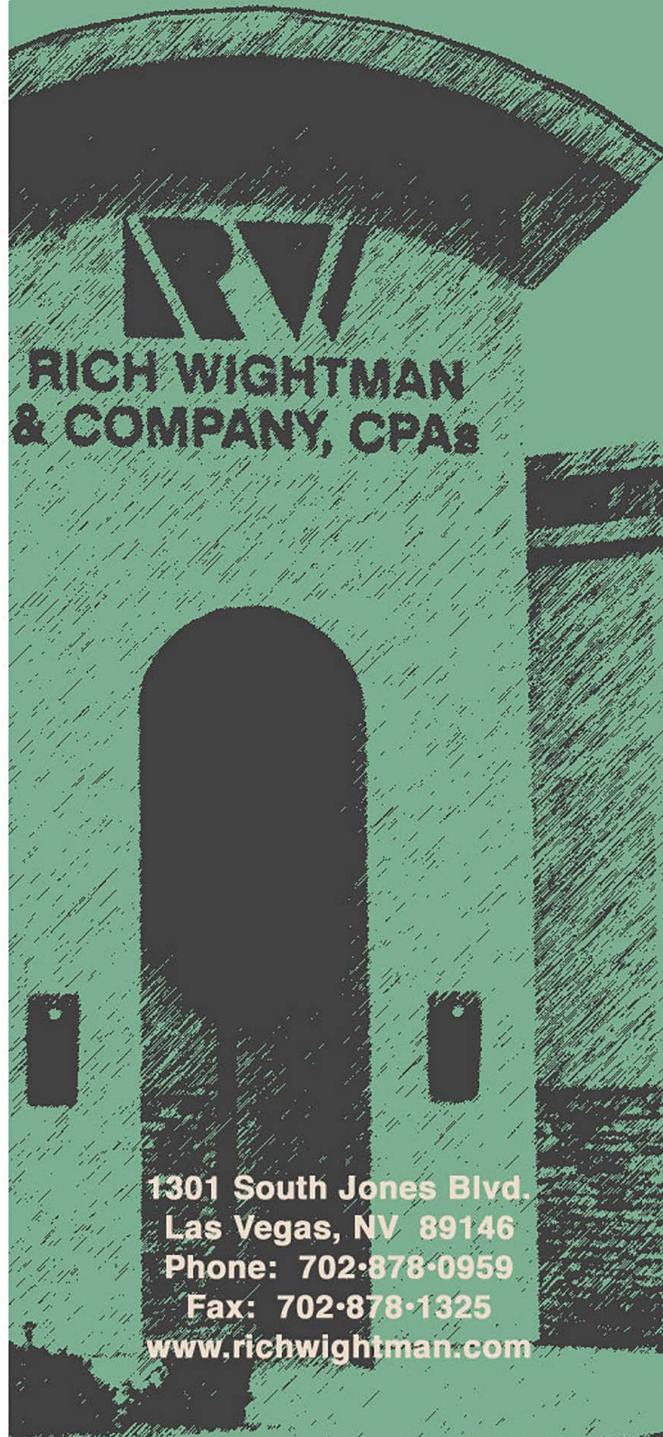
We offer traditional auditing, consulting, and tax services as well as a broad range of other services including estate planning, business valuation, litigation support, fraud investigation and executive accounting to business clients in all financial industries.

Excellent service is what you should demand from your CPA and that's what you will receive from our firm. The financial benefits of our services will exceed the costs. We provide prompt, personal attention to assist our clients' needs and deadlines – all from highly capable people whom you know.

Our highly qualified and experienced staff service clients with operations in a broad range of industries:

- Medical, Legal and Professionals
- Technology and Intellectual Property
- Construction and real estate
- Finance and Investment companies
- Gaming and Entertainment
- Manufacturing and Wholesale Distribution
- Retail Sales and Rental
- Not for profit and government

At Rich, Wightman & Company "We're looking for Partners," Partners in business and Partners through employment.



**RICH  
WIGHTMAN  
& COMPANY**

*Certified Public Accountants*

**Accounting Services**

**Since 1982**



**At Rich, Wightman & Company we are committed to providing clients with the highest degree of technical competence, professionalism and integrity. Our professional staff consists of Certified Public Accountants, MBAs, or equivalent.**

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## Tax Planning & Preparation

- **Planning:** We provide year end tax planning to minimize and timely inform clients of tax liabilities (business and personal)
- **Strategy:** Development of tax strategies related to unusual business transactions
- **Preparation:** We prepare all federal, state and local income tax returns
- **Complex Returns:** We prepare Gift Tax, Trusts, Estate and Not-for-Profit returns
- **Tax Recovery:** We prepare amended returns, net operating loss carrybacks and abatement of penalties
- **Representation:** We represent taxpayers in IRS audits, appeals, collection issues and negotiation of liabilities

## Certified Audits & Financial Statement Preparation

- **Certified:** We audit privately held companies for banking, bonding and regulatory purposes.
- **Benefit Plans:** 401(k) and ESOP audits, including assistance with compliance
- **Compliance:** SOC-1 and SOC-2 audits
- **Not-For-Profit:** 501(c)(3) Charitable organizations
- **Government:** Governmental (Yellow Book) Single Audits
- **Special:** Bankruptcy and agreed upon procedures audits
- **Financial Statement Preparation:** Unaudited, Compilations and Reviews for all industries and businesses (sole proprietors, LLCs, Partnerships and Corporations)

## (Easi can do it) Executive Accounting Services

- **CFO Services:** We provide sophisticated business concepts for management to consider
- **Outsource:** We can be your entire accounting department
- **Competence:** Our CPAs provide monthly accountings that accurately reflect your company's operations on a timely basis that will lower costs of annual tax filings
- **Financials:** We assist with monthly preparation of in-house financial statements
- **Compliance:** We prepare state and local monthly and/or quarterly filings

## Fraud Prevention & Investigation

- **Statistics:** Did you know losses to fraud are estimated to be 5% of your gross revenues? <sup>1</sup>
- **Psychology:** Opportunity, Motivation, and Rationalization are key elements to fraud
- **Training:**
  - Evaluate existing internal controls
  - Design customized internal control procedures
  - Implementation, maintenance and periodic testing of controls
- **Investigation:** Red flags and other evidence of fraud
- **Specialists:** Our fraud unit consists of staff with advanced certifications CFF and CFE designations

## Business Valuation

- **Estate and Tax Planning:** Certain Estate Plans and gift Tax Returns require that a business valuation be performed using methods prescribed by the IRS
- **M&As:** Before and during many business mergers and acquisitions, business valuations will be performed to help determine purchase prices, contract terms, allocations and overall strategy.

- **Litigation:** Quite often the value of a business is a much-debated issue during litigation. Business valuations help to determine equitable resolutions
- **GAAP:** FAS 141 and 142 require, at various times, the application of modern valuation to measure impairment of intangible assets
- **Specialists:** Our valuation staff consists of advanced certifications with CVA designations

## Litigation Support

- **Support:** We commit our accounting staff and firm resources
- **Timeliness:** We communicate missing accounting pieces to keep the case moving forward
- **Strategy:** We inventory and evaluate accounting documents and provide alternative sources to obtain missing pieces
- **Consulting:** We are experienced in handling complex accounting issues. We interpret and translate sophisticated accounting matter to legal jargon
- **Expert:** We have experts that have testified in every court
- **Reports:** We prepare valuation, damage studies, exhibits and settlement proposals

## Estate Planning

- **Minimize Tax:** Or eliminate estate taxes using the most advanced planning techniques
- **Overall Plan:** Working with the client & other professionals to achieve specific goals that include the "Family" and "Family of Business"
- **Compliance:** We prepare all necessary federal, state & foreign filings including Forms 706, 709, 1041, 990, 1065
- **Asset Protection:** Incorporate, if necessary, entities & possible asset protection into overall estate plan
- **Accounting:** We provide annual accounting for court proceedings & beneficiaries
- **Litigation:** Assistance with family disputes, litigation negotiations & evaluation of equitable remedies

<sup>1</sup>Source: ACFE, OCCUPATIONAL FRAUD 2024: A REPORT TO THE NATIONS