



What can you expect From Us



Guidance

We believe in educating our clients and we implement best practices to better assist them in understanding what we do. With guidance, clients receive greater value from our services.



Structure

We utilize structured processes and procedures to gain efficiencies and familiarity.



Teamwork

We work in teams with our clients to provide them with cost effective services and the ability to get answers when they need them.



Ethics

Our profession was founded on public trust, and integrity is a core value for our firm.



Accountability

Our quality control standards ensure we provide accurate services, and we stand behind our work.

OUR CORE VALUES

1

Enhancing client knowledge while providing valued, high quality customer experiences in our areas of expertise.

2

Achieving success through teamwork focusing on communication and accountability.

3

Offering team members challenging work assignments to grow their knowledge with advancement potential within the firm.

4

Demonstrating humility, respect and integrity while adhering to the ethical standards deserving of our CPA firm designation.



OUR CORE FOCUS

1

Our Purpose: WHY we're here ... Be a different kind of accounting firm that appreciates employees, strives for work-life balance, and teaches and provides value to clients that appreciate our work.

2

Our Niche: WHAT we do best ... We're an elite firm providing outstanding services and products through helping, educating and advocating for our clients.

What we expect From You



Respect

We strive to be ethical and respectful in all we do, and we expect the same from our clients in return.



Trust

Through a mix of education and experience, we have the skills and knowledge to provide clients with high quality services. We invest in our team members through training and continuing education, and our CPA's meet or exceed education and experience requirements for licensure. We welcome questions as an opportunity to educate our clients. In doing so and in providing transparency, we anticipate clients will trust the answers and follow the advice we provide.



Structure

For over 75 years, we have continued to refine our systems and processes to provide services as efficiently as possible. We set clear expectations and expect clients to follow our systems and due dates while providing complete and accurate information in a timely manner to enable us to perform the valued services our clients need.



Compensation

We strive to provide services clients value, and in return, we expect timely payment for the services we provide.



Our Ideal Client

- Ethical
- Follows our systems and respects our deadlines
- Organized
- Treats the entire team with respect
- Responsive and timely with information
- Values the services of a firm that acts as an advocate and helps to educate them
- Willingly compensates us for our services

