

Thank You to Our SPONSOR!



CHESS
CHIEF HOUSEWARES
EXECUTIVE SUPERSESSION

IHA
THE HOME AUTHORITY

PROBLEM

Universal Areas of Weakness

01 Data

02 Financials

03 Strategic Planning

OBJECTIVE

Grow the intrinsic financial value of your organization by creating sustainable, predictable and transferable cash flow while building trust in your financials.

HOW TO GET THERE

De-risk your cash flow. Focus on where you need to invest your time, money and capital for the highest return.

SOLUTION

Prescriptive next steps

Evaluate Health of Financials: Assess your trust in your current accounting and financial reports

Benchmark Against Peers: Compare with industry benchmarks to see where you stand

Invest in Efficiency: Technology and process improvements to enhance overall business performance

- Smart Inventory
- Accurate Demand Planning
- Connected Suppliers & Vendors
- Integrated customer ordering solutions

Regular Review of Finance, Inventory, and Accounting Functions: Bi-annual review of listed functions for resource reallocation and cost efficiencies

ABOUT US

Comprehensive Business Services

DELIVERING BUSINESS
SERVICES THAT
INNOVATE AND INSPIRE

TAX

- ◇ Corporate and Non-Profit Tax
- ◇ Estate Tax
- ◇ Tax Reform Initiatives
- ◇ R&D Tax Credits
- ◇ Cost Segregation
- ◇ Federal and State Incentives
- ◇ Community Tax Credits
- ◇ Work Opportunity Tax Credits
- ◇ Employee Retention Credit

RETIREMENT

- ◇ Retirement Plan Advisory
- ◇ 3(38) and 3(21) Fiduciary
- ◇ TPA Recordkeeping
- ◇ Customized Investment Solutions

AUDIT & ATTEST*

- ◇ Audit and Assurance
- ◇ Accounting Services
- ◇ Fraud and Forensic Accounting

OUTSOURCED ACCOUNTING & PAYROLL

- ◇ Accounting and ERP Software
- ◇ Custom Programming and Apps
- ◇ Bookkeeping
- ◇ Virtual CFO/Controller/HR
- ◇ State and Local Tax Registrations
- ◇ Sales and Use Tax Nexus Studies
- ◇ Payroll Processing
- ◇ Benefits Administration

BUSINESS VALUATIONS

- ◇ Accredited Valuations
- ◇ Calculation Reports
- ◇ ESOP Feasibility Studies
- ◇ Succession/Exit Planning

LEGAL

- ◇ Business Incorporations/LLCs
- ◇ Buy-Sell Agreements
- ◇ Real Estate Transactions
- ◇ Litigation Support
- ◇ Powers of Attorney
- ◇ Employee Benefit Plan Legal Services

LENDING

- ◇ Commercial
- ◇ SBA
- ◇ Non-Residential

INSURANCE

- ◇ Commercial Property
- ◇ Life and Disability
- ◇ Long-Term Care and Medicare Supplements
- ◇ General Liability
- ◇ Fleet Auto
- ◇ Workers' Compensation
- ◇ Directors and Officers
- ◇ Surety Bonds

M&A AND CONSULTING

- ◇ Buy- and Sell-Side Investment Banking
- ◇ Turnaround Services
- ◇ Business Performance
- ◇ Executive Coaching and Training
- ◇ Compensation Structure and Analysis

TECHNOLOGY

- ◇ Help Desk Services
- ◇ Virtual CIO
- ◇ Cybersecurity Audits
- ◇ IT Hardware
- ◇ Hosted Cloud Services
- ◇ Off-Site Data Backup

