

BUSINESS ADVISORY

PLANNING FOR YOUR FUTURE



Traditional public accounting services help clients evaluate the past and the present. With our business advisory services, your future is the arena.

Long-term growth and profitability are dependant upon effective business planning and tracking results. We use your business goals as a foundation for our services.

Examples of our services include...

Management Consulting Services

- Cost control systems development
- Design and installation of accounting systems
- Cost and financial information development
- Organization and operations reviews
- Product line profitability analysis

Capital Cost Recovery Planning

- Cost segregation/depreciation studies
- Real estate and personal property tax studies
- Automated fixed asset accounting
- Purchase/lease analysis

Corporate Compensation and Retirement Planning

- Employee benefit plans including 401(k) plans
- Executive compensation plans
- Employee stock ownership plans



Financial Advisory/Special Services

- Research and development credit planning
- Valuation of closely held entities
- Obtaining/evaluating financing alternatives
- Operating result analysis
- Internal forecasts, budgets and projections
- Expert witness testimony
- Regulatory compliance
- Ratio and operating trend analysis

Mergers, Acquisitions and Divestitures

- Design, structure and formation of reorganization transactions
- Tax-free or taxable distributions to shareholders
- Liquidation and sale alternatives
- Evaluation of tax implications
- Preservation of net operating loss carryovers

Tax Accounting Methods

- Cost allocation methods and procedures
- Inventory planning (LIFO, FIFO, etc)
- Installment sales
- Long-term contract methods
- Cash basis method vs. accrual basis method
- Revenue recognition techniques

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Management Information Services

- Business process and systems analysis
- Evaluation and selection of technology vendors
- Business management software consulting

Family and Estate Tax Planning

- Creating a plan /family income shifting
- Buy-sell agreement development
- Recapitalizations of corporate entities
- Estate freezes utilizing partnership and family capital corporations
- Wisconsin Uniform Marital Property Act considerations/divorce tax planning
- Annual gifting program
- Insurance funding analysis
- Personal financial statements

Business Advisory Needs

Rapid growth, changing products and markets, tax and regulatory requirements and increased competition are just a few of the issues that can affect the performance of your business.

Our challenge is to help you address these changing needs by combining traditional financial and tax services with the ability to provide comprehensive business advisory and consulting expertise to you and your business.

Your specific needs may be most effectively addressed by a single management expert or by a team of professionals. We are experienced in working with attorneys, bank officers, insurance agents, investment advisors and other professionals in meeting our clients' planning objectives.



CERTIFIED PUBLIC ACCOUNTANTS & BUSINESS ADVISORS
INTEGRITY COUNTS IN A WORLD OF NUMBERS

Vrakas/Blum S.C. Business Advisory Services

Brenda B. Brandt, CPA
James A. Holmes, CPA
Timothy C. Itzin, CPA
Joseph Jenders, CPA
Michael J. Kuhn, CPA
Charles J. Pavlik, CPA
Michael W. Psuik, CPA
Jayna K. Schultz, CPA
John M. Staehler, CPA, CVA, CFE
Scott J. Wildman, CPA/ABV, CVA



445 South Moorland Road, Suite 400
Brookfield, Wisconsin 53005
Telephone 262.797.0400
Fax 262.797.7895
www.v-b.com



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