## SOLUTIONS TO HELP YOU THREE





## SOLUTIONS TO HELP YOUR BUSINESS THRIVE

We often begin relationships with traditional tax or audit services, but clients quickly realize we can offer so much more. By listening to your needs, we connect you with our experts to help accomplish what's important to you.

Our goal is to help you thrive. We do that by being on and at your side—helping you make the most of opportunities to create, grow and protect value, all with immediate access to seasoned advisors who take your goals personally. It's time to take a closer look at Warren Averett and all we have to offer.

Let's Thrive Together.

TRADITIONAL ACCOUNTING



CORPORATE ADVISORY SERVICES



RISK, SECURITY & TECHNOLOGY



HR SOLUTIONS



FINANCE TEAM SUPPORT



PERSONAL SERVICES





#### Warren Averett 360

Solutions Beyond Traditional Accounting

# Traditional Accounting

Tax Planning

- Tax Consulting
- · Audit Planning and Preparedness

Corporate Advisory Services

- Business Valuation
- Fraud and Forensic Services
- Specialized Tax Services

personal Services

- Wealth Management
- Estate Planning
- Daily Money Management

Payroll

Personal Tax Planning

Our focus is on the client.

- Compliance and Assessments
- CyberSecurity
- IT Remediation Services
- Business Software
- System Infrastructure
- Staffing and Technical Support

 Executive Search and Staffing

- Full Service Retirement Plans
- · Benefit Plan Design and Administration
- Benefit Plan Audits
- HR Consulting

Sinance Team Support

Outsourced CFO/Controller

HR Solutions

# Risk, Security and Technology

### **ABOUT** WARREN **AVERETT**

As one of the region's largest and most resourceful accounting, tax and advisory firms, Warren Averett delivers high quality work and innovative solutions so that our employees and clients can thrive and be successful.

With more than 800 employees and numerous offices across the Southeast, our focus on living our values has helped to establish Warren Averett as an industry leader.

**INTEGRITY IN ALL WE DO** 

**INTENSE CLIENT FOCUS** 

**PASSION TO WIN** 

**TEAM MINDSET** 

**SOLID RELATIONSHIPS** 

**SHARING OUR SUCCESS** 



Warren Averett clients benefit from our experienced professionals and our technical expertise, due in large part to a long history of client service, industry-specific professional training and continuing education programs. Industry specializations include:

- Alternative Investments
- Construction & Real Estate
- Financial Services
- Government
- · Government Contracting
- Healthcare
- Higher Education
- Hospitals & Facilities
- Manufacturing & Distribution
- Nonprofits
- · Oil & Gas and Natural Resources
- Professional Services
- Retail & Consumer Business
- Technology & Life Sciences





With professionals from diverse backgrounds and with real-world experience, we provide a broad range of innovative solutions and strategic guidance around some of the most challenging business circumstances and opportunities.

#### Transaction Advisory

Our transaction strategy is tailor-made and developed with a thorough understanding of our clients' desires, expectations, short-term needs and long-term objectives. We offer a full suite of services, including exit readiness, business performance improvement, transition planning on the sell-side and post acquisition on the buy-side.

#### Business Valuation

We provide valuation services for a wide variety of situations, including but not limited to: transfers/sales of business and mergers and acquisitions; corporate tax planning; ESOPs; financial reporting, including purchase price allocations and goodwill impairment; stock compensation plans and litigation support.

#### Specialized Tax Services

We can identify and provide assistance with R&D tax credits, export incentives, cost segregation studies, fuel tax credits, disaster relief credits and more to maximize benefits arising from your company's processes and innovations.

#### Fraud & Forensic Services

We help our clients deal with situations of fraud or internal control failure. We provide forensic accounting, investigation services, loss remediation services and pre-investigative consulting. We also work alongside attorneys through all phases of the dispute resolution process—from discovery through a trial or hearing.



Technology is constantly evolving, and in order to thrive, your business needs to evolve with it. Warren Averett can give you the freedom to focus on your business goals, while we focus on your IT planning.

#### Compliance & Assessments

We help minimize your company's risk by identifying the necessary controls needed to protect your data and meet compliance requirements. Services include IT control reviews, SOC examinations, control-related projects and industry specific compliance.

#### Cybersecurity

Our team of cybersecurity and risk experts can help you ensure your data is safe through vulnerability and penetration testing, network vulnerability assessments and web app testing.

#### IT Remediation Services

In the event of a breach or cyber attack, efficient and thorough remediation is of utmost importance. We offer a full suite of data security and analysis along with technology consulting that will get your business up and running as quickly as possible.

#### Business Software

We assist your company in the evaluation, selection and implementation of business and accounting software resulting in vital business metrics and reporting to better manage your business.

#### System Infrastructure

We can plan, procure (or provide), install and manage your company's overall infrastructure including disaster recovery, cloud solutions, phone systems, internet connectivity and more.

#### Staffing & Technical Support

Whether you need a temporary outsourced CIO or full-time helpdesk support, our team can provide relief for your staffing and technical support needs.





Warren Averett recognizes that many businesses lack the resources and time that goes into hiring, training and retaining their staff. Such companies need human resource solutions that supply them with the skills and expertise they need on a flexible basis.

#### Executive Search & Staffing

We recruit the best professionals for your business so you can stay focused on what you do best.

#### HR Consulting

We can help your company optimize the talent management process, develop your next generation of leaders and conduct assessments and other value-added HR solutions, including outplacement services.

#### Full Service Retirement Plans

We can customize a comprehensive retirement plan solution (401k Complete) that meets a wide spectrum of retirement plan needs, including recordkeeping, administrative services, compliance testing and government reporting.

#### Benefit Plan Design & Administration

We design retirement plans that fit your company, providing tax advantages to business owners and helping employees achieve retirement security.

#### Benefit Plan Audits

We provide a cost-effective audit while maintaining the high standards required by regulatory agencies.



The proper accounting and financial support is necessary for any company to thrive. If maintaining a full-time accounting department is not feasible for your organization, Warren Averett can provide financial solutions customized to support your needs.

#### Outsourced CFO/Controller

We help plan, prioritize and achieve your company's financial goals utilizing technology and specialized industry experience to automate workflows, streamline processes and provide relevant real-time performance and financial reporting.

#### Outsourced Accounting Team Services

Our team can support your business by performing the most critical accounting functions, including financial statement preparation, accounts payable, accounts receivable and monthly general ledgers. We prepare timely and relevant financial information for businesses across all industries.

#### Payroll Services

We provide payroll services for companies with as few as five and as many as 5,000 employees, using our payroll experts and a robust payroll platform.



Warren Averett supports individuals in many areas including financial and retirement planning, investment management, estate planning, personal CFO services, tax planning and more.

#### Wealth Management

We advise on assets in excess of \$2.5 Billion, using a comprehensive approach that blends investment management with tax, estate, education, retirement and financial planning services.

#### Estate Planning

We provide strategic advice and a personalized plan to ensure your estate and all of your assets are in the best position to make important elections.

#### Daily Money Management

We provide busy executives and retirees a customized cache of personal accounting services and lifestyle management support so you can focus on the business of living.

#### Personal Tax Planning





