



## SOLUTIONS UNIQUELY DESIGNED FOR PROFESSIONAL SERVICE FIRMS

**As a professional services firm ourselves, Warren Averett understands the unique needs and areas of concern our professional service clients face. From technology and controls to benefit plan and HR support, we have created solutions to help keep your organization is compliant, competitive and efficient.**

### UTILIZE CREDIBLE RESOURCES

**Litigation Support:** We provide expert witness testimony for both commercial and individual clients when an objective, unbiased evaluation of the facts is required. Whether you need a consultant or expert witness, Warren Averett's accounting professionals can be a valuable component of a successful litigation strategy. We have experience in complex cases and well-established reputation for objective and authoritative financial expertise.

**Valuation:** Decisions based on the value of the business have far-reaching effects. Warren Averett can help establish an accurate assessment of a business with our in-depth, specialized knowledge that includes a comprehensive understanding of the business, the economic environment and the industry

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## UNIQUE NEEDS

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in which it operates. Our experts are utilized during various situations including acquisitions, divorce cases and lost profits/damages for litigation.

### MAINTAIN A COMPETITIVE EDGE

**ISA/ISR:** With heightened awareness on information security, many organizations are not only increasing their information security standards to protect confidential customer data, but also extending that liability to their partners and vendors for compliance. Many companies in regulated industries, including insurance, banking and healthcare, now require an official set of "Information Security Requirements" to be met. These requirements include daily implementations and management of technologies to ensure compliance on an ongoing basis. Most business's IT staff are not equipped to handle this – many don't even know where to start. Warren Averett can help – we provide a solution that allows you to keep your business partnerships with these organizations by assessing your security measures, helping you become compliant and stay compliant.

**SOC:** Service Organization Control Reports can help your organization Validate the IT Security controls, policies and procedures in place that help set your Firm apart from others. Clients are doing more due

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diligence on their service providers, and our auditors and specialists can help your organization report on your established controls.

**Technology Services:** Professional Service firms are having to deal with new obstacles around data security and integrity. Many organizations are realizing the need for increased information security, and are looking to hire Chief Information Security Officers. Warren Averett offers a unique alternative to this, where you can outsource that position and save the time and cost of hiring someone.

## PROTECTING YOUR MOST IMPORTANT ASSET—PEOPLE

**HR:** Warren Averett offered human capital solutions like HR consulting, executive coaching, and handbook and policy reviews. Your workforce is your most important asset, so investing in this area can help your organization thrive by creating efficiencies, improving trust and lowering turnover.

**401k Complete:** Warren Averett Asset Management works with organizations to meet their employee benefit plan needs. You may be looking for better investment options, a more cost effective plan design or a higher level of service. We offer professionals with expertise in performing many aspects and services related to a company's retirement plan from investment management to recordkeeping/administration.

**Financial and Retirement Planning:** Studies reveal that financial and retirement planning are the biggest stress factors in people's lives. Why not take this stress away from your employees by offering them financial planning services from Warren Averett Asset Management. We partner with many organizations to provide these services free of charge to your employees as a benefit or bonus offered by the organization. Our advisors create customized financial, estate and retirement plans to ensure our clients can feel good about the future.



## PROFESSIONAL SERVICES

### Traditional Accounting

- Tax Planning and Strategy

### Corporate Advisory Services

- Transaction Advisory
- Business Valuations
- Buy/Sell Due Diligence
- Fraud & Forensics
- ALTA certification

### HR Solutions

- Staffing
- Executive Coaching
- 401k Account Management
- Handbook and Policy reviews
- Executive/Administrative Coaching
- HR Consulting

### Technology and Risk

- Risk & Controls (SOC)
- Cyber Security

### Personal Services

- Retirement Planning

### Finance Team Support

- Cloud-Based Accounting
- Back office services

To learn how your professional service organization can use a strong partner like Warren Averett, visit [www.warrenaverett.com/proservices](http://www.warrenaverett.com/proservices) or call 800.759.7857.