SOLUTIONS TO HELP YOU 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.
Our focus is on the CLIENT

PERSONAL SERVICES
- Wealth Management
- Estate Planning
- Daily Money Management
- Personal Tax Planning

FINANCE TEAM SUPPORT
- Outsourced CFO / Controller Services
- Bookkeeping
- Payroll Services

Traditional Accounting

Corporate Advisory Services
- Transaction Advisory
- Business Valuation
- Regulatory, Compliance, Risk & Controls
- Litigation Support
- Specialty Tax

TECHNOLOGY & RISK SOLUTIONS
- IT Security
- Business Software
- Risk & Compliance
- System Infrastructure
- Staffing and Help Desk

HR SOLUTIONS
- Executive Search & Staffing
- Talent Management & Consulting
- Full Service Retirement Plans
- Benefit Plan Design & Administration
- Employee Benefit Plan Audits

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 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
ENTREPRENEURSHIP
SHARING OUR SUCCESS
Warren Averett clients benefit from our experienced professionals and 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
- Hospital & Facilities
- Manufacturing & Distribution
- Nonprofits
- Oil & Gas and Natural Resources
- Professional Services
- Retail & Consumer Business
- Technology & Life Sciences
- Transportation
CORPORATE ADVISORY SERVICES

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 Support**
  Offer transactional support such as raising capital, preparing your business for sale, quality earning studies, net working capital analyses and acquisition-related Financial, HR and Technology due diligence

• **Business Consulting**
  Advise on a variety of situations through the business life cycle including value creation, strategic planning, business valuations, fraud, forensics and litigation support

• **Specialty Tax Services**
  Tackle unique and complex tax issues including state and local taxes, international taxes, R&D tax credits, other federal and state credits and cost segregation studies

• **Regulatory, Compliance, Risk and Controls**
  Assist in keeping up with all required laws and regulations to keep your company in good standing, including internal controls and compliance examinations
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.

- **Security**
  Identify and remediate flaws or vulnerabilities in your IT environment to safeguard data (i.e. customer, employee, vendor, industry)

- **Software**
  Assist in the evaluation, selection and implementation of business and accounting software resulting in vital business metrics and reporting to better manage your business

- **Risk and Compliance**
  Minimize your risk by identifying the necessary controls needed to protect your data and meet necessary industry compliance requirements

- **System Infrastructure**
  Plan, procure (or provide), install, and manage your overall IT infrastructure

- **People**
  Outsource or supplement your IT staff, including your CIO, permanent and contract staffing
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**
  Recruit the best professionals for your business so you can stay focused on what you do best

• **Talent Management & Consulting**
  Customize HR, employee development and human capital solutions to meet your coaching, training, HR administration and HR project needs

• **Full Service Retirement Plans**
  (401k Complete) Customize a comprehensive retirement plan solution with 3(38) fiduciary investment management, daily recordkeeping, plan design and employee education all under one retirement plan umbrella

• **Retirement Plan Design & Administration**
  Design retirement plans that fit your company, providing tax advantages to business owners and helping employees achieve retirement security

• **Benefit Plan Audits**
  Provide a cost-effective audit while maintaining high standards required by regulatory agencies to establish credibility and confidence in your organization and trustees
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 business, Warren Averett can provide financial solutions, customized to support your company’s needs.

- **CFO/Controller Services**
  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

- **Bookkeeping Services**
  Support your business through the timely capture of data, performing the most critical accounting functions, and preparing timely and relevant financial information

- **Payroll**
  Provide payroll services for companies with as few as 5, 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**
  Advise on assets in excess of $2.4 Billion, using a comprehensive approach that blends investment management, tax, estate, education, retirement and financial planning services

- **Estate Planning**
  Provide strategic advice and a personalized plan to ensure your estate and all assets are in the best position to make important elections

- **Daily Money Management**
  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**
  Offer a wealth of accounting knowledge, tax planning strategy and financial planning resources to meet your individual needs