# TAX EXPERTS - Sample Profiles

MY BUSINESS EXITTEAM

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|---|---|---|---|
| Unique ID | 698692447 | 720774081 | 830945084 |
| Firm Location (City) | Boston | Woburn | David |
| Firm Location (State) | MA | MA | Foster |
| Firm Location (Zip) | | | |
| Your firm's geographic range (where you will accept clients from) | Nationally | No range | Northeast |
| General description of your firm's offerings | Full service tax and business advisory firm with a national tax practice. | We offer all types of business and individual tax services including International, Outsource Management Accounting, Financial Statement Audit and Attest, Employee Benefit Plan Audits, Business Advisory and Valuation services for a variety of businesses and individuals (including estates and trusts). | We are a CPA firm offering accounting, tax, consulting and exit planning services. |
| Specific services or niches your firm specializes in | Real estate owner and operators | Construction and Real Estate, Owner Managed Businesses, Private Equity, Real Estate Investment, Hospitality, Start-ups, High-Net Worth individuals | Tax and exit / succession planning services for business owners. |
| How your firm gets paid (Hourly, Modular, Commission, % of Sale Price, etc.) | Rate times hour or agreed upon fixed fee. | Hourly and modular | Hourly or fixed fee depending on scope of engagement. |
| Do you do free initial consultations? 30 mins, 60 mins? | Yes. 60 minutes. | Absolutely | Yes, 30 minutes |
| Number of employees in your firm | Approximately 5,000 nationally, 120 in Boston | 70 | 12 |
| What makes your firm unique? | We are a tax firm with no audit practice. This provides us the ability to provide business services to our client with no independence issues created by a audit practice. This allows us to work more efficiently with our clients. We also have a full national tax practice to help client with the most complex tax issues. | We strive to develop relationships to become a stronger part of your team, not just a once a year call. With our knowledge, experience and other business contacts we are here to make your business and personal financial situations a success. We educate you on the why and bringing focus to your business. Let us be your business advisors and part of your present and future.<br>LGA team members also live by what we call fundamentals. In order for a company's values to define its culture, team members must live them every day. We have identified 33 actionable and transparent behaviors that reinforce our values. This has been a weekly process for the last 2 years now. | We understand the challenges that business owners encounter on a daily basis. |
| Minimum Client size (# of Employees / Revenue / EBITDA etc.) | I focus on clients with real estate holdings between $20M to $1B in real estate assets. | Employees 0+<br>Revenue $250K+ | None |
| Industries Services (All or Specific) | Real estate | Not limited to but consists of Construction and Real Estate, Owner Managed Businesses, Private Equity, Real Estate Investment, Hospitality, Start-ups, High-Net Worth individuals | All |
| Other criteria in choosing your prospects | I'm not the person to come to work with if you just want a tax return prepared. I work best with clients to provide a full 360 look at the client. I'm best if a client is looking for value added services. | Values the services and attention we provide | Individuals / Business Owners who looking for more than tax preparation services. |
| Number of years experience in your field | 25 years | 23 | 38 |
| Industry Designations (CFP, CLA, CPA etc.) | CPA | CPA | CPA, CGMA, CBEC |
| Best times to contact you | | | |
| Preferred Communication Methods | In Person, Phone, Zoom / Skype etc. | In Person<br>Phone<br>Email<br>Zoom / Skype etc. | In Person<br>Phone |
| Elevator Pitch / Anything prospective clients should know about you? | I have over 25 years of experience providing tax, consulting, and advisory services to a wide range of institutional, family-owned, and entrepreneurial real estate clients. I have expertise and depth of knowledge in real estate taxation with extensive experience on the structuring of partnership and real estate transactions, taxable and non-taxable dispositions of properties, special lease planning, and exit strategies for owners. | My 23 years of experience involves ongoing tax advice/compliance/planning and business advisory services with closely held and family owned business. This CPA believes in factoring in both the needs of an owner and an individual is equally important. Call me when you need a personal touch on understanding and maximizing your business and personal tax situation (past, present and future). | Most CPA firms solve problems, we prevent them |