Firm Overview

"Entrepreneur Focused, Technology Driven"

Samuel Goldstein & Co.

Certified Public Accountants

Executive Overview

ORGANIZATIONAL GROWTH

Samuel Goldstein & Co. is a multi-generational CPA and advisory firm. We collaborate with clients to plan for the critical elements of their business and personal life.

OUR CLIENTS INCLUDE:

- Closely Held Companies
- Entrepreneurs
- High Net Worth Individuals
- Multi-Generational Businesses
- Non-Profit Organizations

CLIENT CENTRIC FOCUS

Our mission is to support our clients unique and evolving needs. To that end, as a team we develop strategies and monitor the ensuing results. We make changes to the plan as a result of changes in the business environment. Targeted meetings ensure steady interaction, keeping your firm and our company continually focused in the right direction.

OUR APPROACH

Understanding your needs and goals is the initial step. What are the top items that drive your organization? How much time should be spent on them? We use an in-depth discovery needs assessment process that involves structured methods to best understand your needs and long term vision. We prepare tax returns for the government, financial statements for the banks, and advisory services for our clients.

Focused Goal Setting

Profit Enhancement

CFO Services

Entrepreneurial Support

Compliance Reporting

Employee Benefit Plan Audits

Tax Strategies

Personal Financial Planning

Exit & Succession

Your Trusted Advisor

WHAT TO EXPECT

A Unique Client Support Plan (UCSP)
Our role is to provide client value and the measure of success is meeting the goals you set. We tailor services to create detailed steps to meet those goals.

Responsive, Qualified Advice
Our clients trust us. We know they need answers, not just information. We provide fresh, sharp, and practical ideas to meet their unique situations and address issues that arise.

Open, Clear & Timely Communication
Clients receive an interactive relationship with us. We know value is best delivered by not just following the client's requests, but also challenging ideas when appropriate and refining concepts with them.

Responsibility & Bottom-Line Results
We understand a good relationship requires both input from us and our client and we take the responsibility in driving that relationship. In the end, what counts is the final performance. Tax returns, financial statements and accounting support are tools we use to build dashboards to view and manage financial performance.

Profitability and Taxes Should Be Events with Planned Outcomes

ENGAGEMENT PROCESS

Communication Drives Our Approach
We proactively send communications and schedule meetings to efficiently use your time and minimize interruption to your office.

Our 5 Steps to Client Support
We provide an unbiased perspective to assess ideas, opportunities and obstacles.

1. Understanding your service expectations and values.
2. Documenting these needs and creating your UCSP.
3. Communicating frequently and timely.
4. Preparing financial statements and tax returns accurately and timely.
5. Ensuring you receive the advice to prioritize financial details.

SERVICES OVERVIEW

Advisory & Goal Setting
- Establishing written goals
- Conducting profitability analysis
- Developing business dashboards
- Set meetings to monitor progress
- Multi-year planning services

Financial Reporting
- Customized management reports
- Personal financial statements
- Audits, reviews & compilations
- Employee benefit plan audits
- Agreed upon procedures
- Internal controls and assessments

Managed Accounting
- Complete or partial outsourcing of your accounting
- Management of your accounting staff
- CFO/Controllership; we become your trusted advisor and financial right hand
- Bookkeeping; daily to quarterly support
- Accounting and financial reports; to get the information you need
- Payroll; we take care of your payroll function
- Tax compliance; we prepare all returns and handle all filings
- Bill payment; our team will handle everything for you

Tax Planning & Return Preparation
- Business entity tax returns
- Sales & use tax and multi-state tax issues
- Business tax planning
- Entity selection; i.e. partnerships, LLCs
- Personal tax planning
- College & retirement planning
- Estates & trusts
- Family wealth & gifting strategies
- Tax audit & inquiry representation
- Individual tax returns

Accounting Support
- Assistance closing the books
- Management of in-house financial personnel
- Setting up a uniform chart of accounts
- Accounting system installation
- Ensuring tax compliance & reporting

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