

## Who We Serve

We work with family-owned businesses of all sizes, from start-up to large, multi-national entities. We understand the highs and lows and special needs of the growing business and its owner.

For emerging businesses, we help them to identify opportunities, as well as overcome problems, in such diverse areas as: financial management; purchasing, production and inventory; information processing; human resources; general management; and personal finances.

Larger companies, in comparison, rely upon **HMWC CPAs & Business Advisors** to handle audits, sophisticated tax planning, mergers and acquisitions, and provide them with creative solutions to their ever-changing needs and challenges.

**HMWC CPAs & Business Advisors** has developed expertise over many decades in serving the needs of businesses in numerous industries. Our experience gives us the insight to provide creative solutions to your ever-changing needs and challenges. We help you to identify opportunities, as well as overcome challenges in your day-to-day operations. While we have served clients in most Southern California industries, the predominant industries include:

- Healthcare
- Real Estate
- Contractors
- Emerging Businesses
- Manufacturing & Distribution
- Financial Services
- Professional Services
- Not-for-Profit
- Women-Owned Businesses

### **HMWC CPAs & Business Advisors**

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**CPAs & Business Advisors**

*Family  
Owned  
Businesses*

# A Specialized Practice

# Services

Family-owned businesses are a powerful economic force, accounting for 50% of the gross domestic product and about 60% of the nation's employment and over 75% of new jobs created. These family-based operations are represented across the full spectrum of U.S. companies, from small businesses to large corporations. As such, these businesses have a wide variety of accounting, tax, financial and business management issues.

## Focused on Your Needs

Since 1968, **HMWC CPAs & Business Advisors** has specialized in serving the financial and tax needs of family-owned and other privately-held businesses and their owners throughout Southern California. In fact, our commitment is so strong that we do not serve any publicly-owned companies.

**HMWC CPAs & Business Advisors** has been recognized as one of the "best-managed CPA firms in the USA" by *Inside Public Accounting* magazine and ranked as one of Orange County's top accounting firms by the Orange County Business Journal.

Our mission is to "Provide our clients, regardless of size, with a level of service and quality that is unparalleled in the industry." The depth and breadth of our experience make us a valuable member of our clients' management team. At **HMWC CPAs & Business Advisors**, we are more than accountants, we are trusted business advisors.

## Accounting & Audit

These services are aimed at enhancing the consistency and credibility of financial information that is utilized by investors, lenders and management.

- Audits, reviews and compilations
- Interim and pro-forma financial information
- Evaluation and design of internal accounting systems

## Tax

We provide a full range of tax compliance and planning services for corporations, partnerships, not-for-profit entities and individuals, as well as trusts and estates.

## Entrepreneurial Business Services

For those small-to-medium size companies that need full-support, our *Complete Financial Office Solutions* department provides a variety of services:

### Business Formation & Planning

- Legal structure/entity type selection
- Business planning
- Succession planning

### Financial Management

- Bookkeeping, bill paying and payroll
- Personal financial statements
- Controller/CFO services
- Family office

### Employment & Human Resources

- Hiring/executive search
- Training accounting employees
- Employee Policies and Procedures Manual
- Payroll taxes

### Referrals to Other Professional Services

- Attorneys, bankers and insurance brokers
- Investment management
- Employee benefits and pension
- Group purchasing discount programs

## Business Advisory

We offer a complete range of business consulting services including:

- Income statement and balance sheet projections
- Working capital/cash flow management
- Inventory costing and control systems
- Review and evaluation of internal financial controls

## Information Technology

We help your company to select software with appropriate accounting system capabilities, and a hardware system to generate critical management information.

## Pension & Human Resources

**HMWC CPAs & Business Advisors** works with our clients and their third party administrator to custom design plans to meet each company's specific needs.

## Estate Planning & Financial Planning

We help with issues such as succession planning, estate planning and gifting programs, retirement planning, and financing children's education.

## Investment Advisory

Our affiliate Yosemite Capital Management, LLC, provides investment advisory services, capital management and in-depth portfolio planning.

## Mergers & Acquisitions

Business owners appreciate our connections and expertise in mergers and acquisitions, corporate finance and bank financing services. These can be critical for the growth and expansion of your business.

## Business Valuation

Our business appraisers prepare valuations for a number of scenarios, including litigation, estate planning and mergers and acquisitions.