

Management Team

HMWC CPAs & Business Advisors has a highly talented leadership group whose involvement on each account helps ensure that our clients receive the necessary attention and personal service needed to effectively manage their businesses.

Susan Levinstein, CPA

Susan Levinstein is a Partner and supervises **HMWC CPAs & Business Advisors'** *Women-Owned Business* practice and the *Complete Financial Office Solutions* department. She received her B.S. degree in Accounting from California State University, Northridge in 1987. After graduation, Susan joined the accounting firm of PriceWaterhouseCoopers, where she worked for almost six years in both the tax and audit departments of their Los Angeles and South Florida offices. Susan joined **HMWC CPAs & Business Advisors** in 1993. She is a member of the AICPA and CalCPA.



Lisa Young, CPA

Lisa Young is a Senior Accounting and Tax Manager in **HMWC CPAs & Business Advisors'** *Women-Owned Business* practice and the *Complete Financial Office Solutions* department. Lisa's accounting, tax and audit experience has emphasized serving closely-held, owner-managed businesses. Her comprehensive accounting background includes experience in both public accounting and in the private business sector. She has significant experience in the restaurant, professional services, distribution and retail industries. Lisa graduated Magna Cum Laude from Grand Canyon University in Phoenix, Arizona with a B.S. degree in Accounting in 1992. Lisa is a member of the AICPA and CalCPA.



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CPAs & Business Advisors

Women- Owned Business Practice



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A Specialized Practice

Services

Women-Owned Business Practice

HMWC CPAs & Business Advisors' *Women-Owned Business* practice is designed to help your business grow and achieve financial success, as well as to help you, as owners, fulfill your personal goals for professionalism, career satisfaction and life balance.

As your trusted business advisors, the experts in our *Women-Owned Business* practice will help you to successfully navigate the unique issues faced by women business owners. Our practice is staffed by CPAs and other highly credentialed advisors, both female and male, to best serve our clients.

We can also help you establish relationships with other professional service providers, as well as vendors/suppliers/business partners, so that you have an array of resources on-hand to help your business achieve its optimal success. If community involvement and philanthropic activities are important to you, our experts can even provide guidance on how to integrate your business activities with these important programs.

About HMWC

Since 1968, **HMWC CPAs & Business Advisors** has specialized in serving the financial and tax needs of privately-held businesses and their owners. Our mission is to *"Provide our clients, regardless of size, with a level of service and quality that is unparalleled in the industry."*

HMWC CPAs & Business Advisors has been recognized as one of the "best-managed CPA firms in the USA" by *Inside Public Accounting* magazine. Our firm has a highly talented partner and manager group whose involvement on each account helps ensure that every client receives the necessary attention and personal service needed to effectively manage their business.

Entrepreneurial Business Services

Our *Women-Owned Business* practice works in conjunction with our *Complete Financial Office Solutions* department to provide full-support for small-to-medium size companies. These services include:

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
- Elder care

Employment & Human Resources

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

Referrals to Other Professional Services

- Attorneys
- Bankers
- Insurance brokers
- Investment management
- Employee benefits and pension
- Group purchasing discount programs
- Payroll service providers

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.

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

As tax consultants and business advisors, we work with our clients and their third party administrators 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.