

# 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 is a Partner and supervises **HMWC's 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** in 1993 and is a member of the AICPA and CalCPA.



## **Robin Aldrich**

Robin is a Supervisor in **HMWC's Complete Financial Office Solutions** department. Robin has extensive experience in managing her clients' day-to-day financial responsibilities, including budgeting, forecasting, training, and multi-entity accounting.



## **HMWC CPAs & Business Advisors**

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**CPAs & Business Advisors**

**Complete  
Financial  
Office  
Solutions**

for

**Small to Mid-Size  
Businesses  
& Successful  
Individuals**



# Focused on Your Needs

# Services

# About HMWC

Small to medium-size businesses face a common dilemma: How to handle the myriad accounting, financial, and business management issues with limited human and financial resources. Further compounding the problem, most businesses of this size cannot afford to pay a full-time accounting and finance department staff.

## Who We Serve

**HMWC CPAs & Business Advisors** has a solution for your problem. Our **Complete Financial Office Solutions** department provides expert guidance and support for those clients who need regular assistance, not just annual tax returns or financial statement preparation, or for businesses that cannot afford full-time accounting and finance department staff. This not only helps to ease financial concerns but also allows our clients to do what they do best – run their businesses.

For successful individuals, our team offers hands-on assistance with day-to-day financial duties. We strive to make lives easier for those individuals and families by handling such tasks as personal bill paying, cash management, estate planning, tax returns and domestic employee issues.



## Business Formation & Planning

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

## Financial Management

- Software selection and implementation
- Bookkeeping/outsourced accounting
- Bill paying
- Payroll
- Financial statement compilations and reviews
- Personal financial statements
- Budgeting & Forecasting
- Tax planning and projections
- Tax return preparation
- Cash management
- Controller/CFO services
- Family office
- Estate planning

## Recordkeeping

- Payroll/labor records
- Bank reconciliations
- Accounts payable and accounts receivables
- Payroll and sales tax returns
- Monthly financial statement and general ledger

## Employment Matters

- Training accounting employees
- Payroll taxes

## Referrals to Other Professional Services

- Attorneys
- Bankers
- Insurance brokers
- Investment managers
- Employee benefits and pension administrators
- Payroll service providers
- Business valuation specialists

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 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. We are more than accountants, we are *trusted business advisors*.

Should your business need assistance with issues outside of California, **HMWC CPAs & Business Advisors** is positioned to help you. As a member of **Integra International**, an interactive global association of local independent accounting and consulting firms, we have both a national and international presence that provides us with the resources to assist clients on a variety of multi-state and global tax and business issues.

## Industries Served:

- Construction
- Real Estate
- Healthcare - Dental
- Healthcare - Physicians
- Family-Owned Business
- Manufacturing & Distribution
- Not-for-Profit
- Professional Services
- Women-Owned Business

Contact us for a free consultation.  
(714) 505-9000