



2020
2021



TAX PLANNING GUIDE

Year-round
strategies to
make the tax
laws work
for you

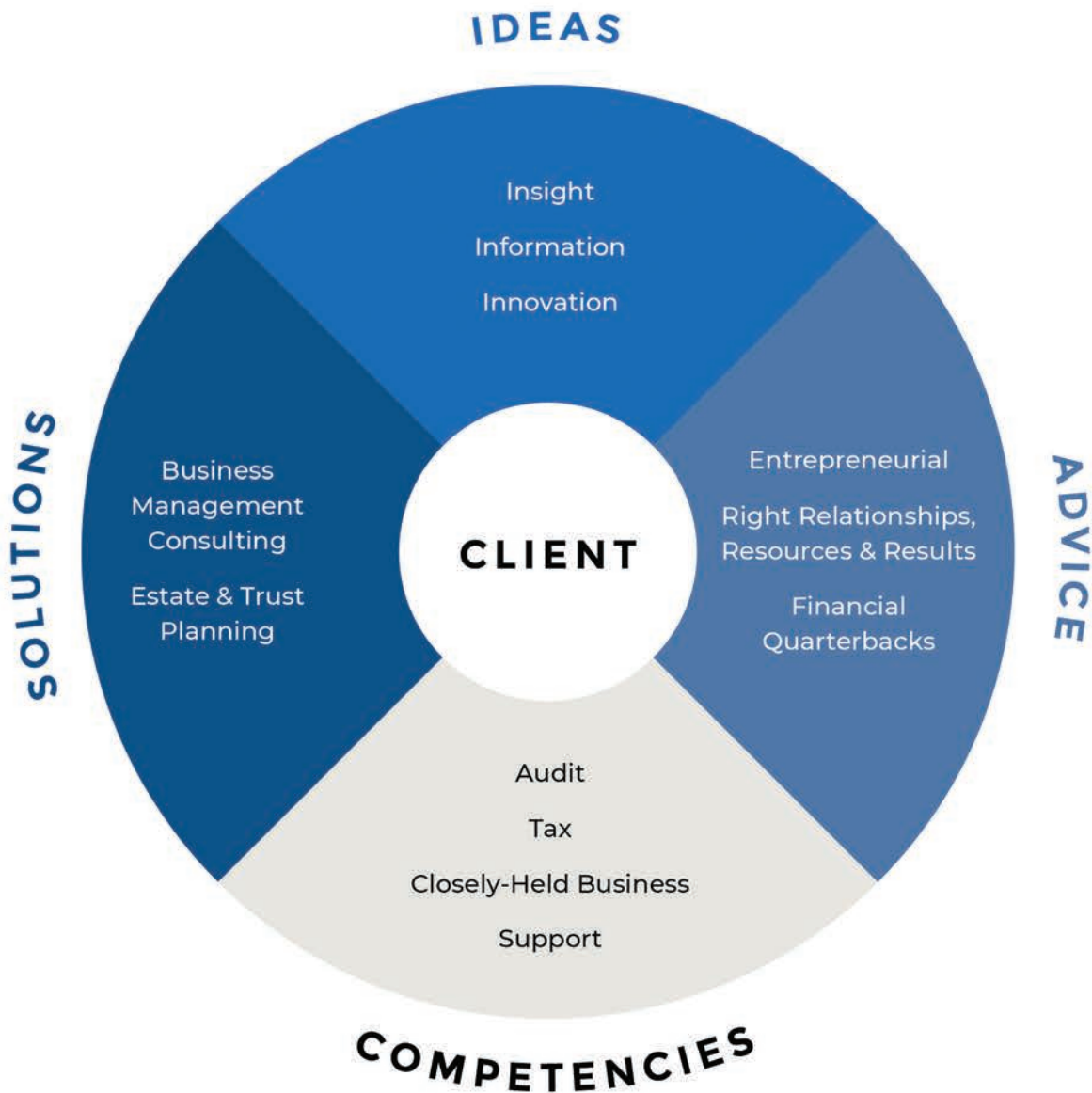


Wertz & Company^{LLC}

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Irvine, CA 92620
(949) 756-5000
www.wertzco.com

Client Centered Approach

Throughout the history of Wertz & Company, we have always put clients first. And although the business tools we use and business climate we operate in has changed, our approach to service is exactly the same as the day we began.



Our business is built upon a keen understanding of the needs of our entrepreneurial and small business clients. We surround their most vital needs with strong suite of advice, ideas, competencies and solutions to help them thrive.

Wertz & Company^{LLP}

CORE COMPETENCIES

Tax Preparation and Planning

Personal Tax Services

- Planning and preparation
- Tax minimization strategies
- IRS & FTB audit representation
- Tax implications of financial planning

Corporate Tax Services

- Planning and preparation
- Tax minimization strategies
- IRS & FTB audit representation
- Structure selection
- Merger & acquisition analysis
- Restructuring and reorganization planning
- Executive compensation planning
- Liquidation and dissolutions
- Capital investment planning

Estate and Trust

- Planning and preparation
- IRS & FTB audit representation
- Estate and gifting preparation
- Fiduciary accounting
- Estate and trust administration
- College Education Funding
- Multi-Generational Estate Planning
- Planning for retirement

Attest Services

- Audits, reviews and compilations
- Compliance and collateral audits
- Pension and ERISA audits
- Due diligence exams
- Internal controls studies
- Agreed upon procedures audits
- Investment performance audits

Entrepreneurial Services (Outsourced CFO)

- External accounting/bookkeeping support
- General ledger entry and month-end closings
- Payroll, property and sales tax return filings
- Accounting system design, implementation and planning
- Cost control analysis
- Business budgeting and projection assistance

Management Consulting Services

- Organization structure analysis & development
- Strategic business planning
- Cash flow analysis
- Budget development
- Accounting and reporting system design
- Policies & procedures analysis
- Expansion strategy development
- Merger and acquisition analysis
- Turn-around assistance
- Equity transition planning
- Leadership training & accountability
- Buy/Sell analysis
- Due diligence
- Business valuations
- Financing package development and representation
- Strategic planning
- Temporary CFO/controller/accounting staff
- Bankruptcy
- Litigation support
- Forensic accounting

CALL US TODAY (949) 756-5000

Wertz & Company^{LLP}

VISION:

Be Client Centered

MISSION:

Build
Maintain
Grown Enterprises

STRATEGY:

Be Entrepreneurial

PROFESSIONAL SERVICE PROCESS:

Ask
Listen
Understand
Act

PHILOSOPHY:

Think Outside the Box
Insight
Innovation
Implementation

VALUES:

Right Relationships
Depth of Resources
Passion for Results

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