Industry Group

Professional Services

GeffenMesher

888 SW 5TH AVENUE, SUITE 800, PORTLAND, OR 97204
tel 503-221-0141 | *fax* 503-227-7924 | 800-819-0141

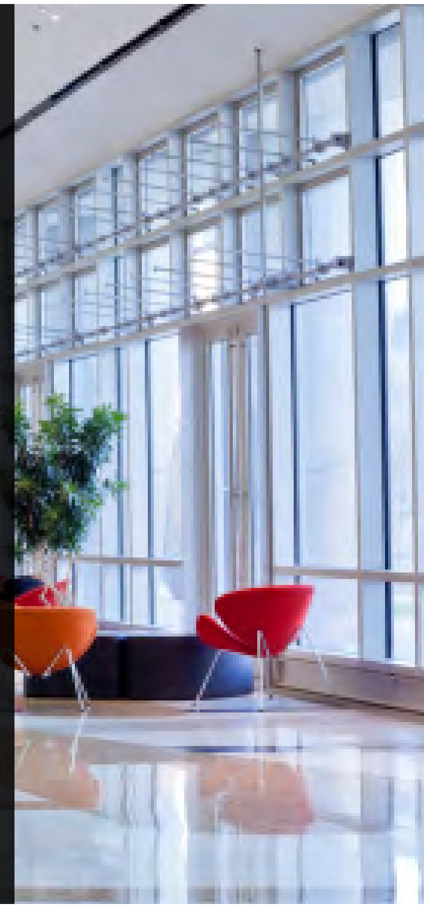
Serving Businesses *that* Serve Others

TRUSTED ADVISOR...

After working closely with one of the region's larger professional services firms for 15 years, they found themselves evaluating big internal changes. In due course they began the process of transitioning from a partnership to a corporation, which would simplify their tax filings that had become increasingly cumbersome as they grew and opened or acquired offices in different states. On our end, we knew the switch would lessen the revenue we earned from their account, a fact we openly shared as we presented our assessment. The decision was in their best interest, so we completely endorsed it.

Not long afterward, Kathy, who'd been CFO for nearly 20 years, decided it was time for a new challenge and she called us early in the process. We'd worked closely with her for years, and she wanted to be sure her soon-to-be former firm was taken care of during the transition. Upon her stepping down, we put in extra hours to help bridge any gaps of understanding in the process. From there, we provided additional support as they considered prospective candidates until they found the right fit.

Today this client still relies on us for our honest insight, planning and recommendations.



SERVING BUSINESSES THAT SERVE OTHERS

Our professional services industry group covers the needs of our most diverse set of clients and business types, from national law firms, to small dental practices, financial advisors, creative agencies, architecture firms, and even some of Portland's most popular restaurants. What they share is a basic tenet of wanting to provide their clients, customers, patients and patrons with a level of services that builds trust, goodwill, strong referrals and long-standing relationships. When they partner with us for tax, auditing and advisory services, they see we follow the same path.

Their needs vary as much as the businesses themselves. A key component to our process lies in the fact that our people know the language for a multitude of business types and industries, and are experts at solving the critical tax, auditing, compliance and planning needs that affect each of them.

"WHETHER WE'RE WORKING ON THE COMPLIANCE, TAX OR PLANNING SIDE, WE LOVE ANY OPPORTUNITY TO WORK CLOSELY WITH OWNERS AND MANAGEMENT GROUPS IN ORDER TO SERVE THEM AT THE HIGHEST LEVEL."

Dave Adams, SHAREHOLDER

We focus on staying ahead of industry trends, changes to tax code, key dates and filing deadlines, and supporting clients over a broad spectrum of needs, including bank covenants to share pricing, cash flow, cost-of-goods, accounts receivable and more. Our more than 100 service-based clients are scattered throughout the Northwest, with gross revenues ranging from $1 million to $100 million. In working with them for years and even decades, we continue to apply the oversight, direct services and advising they need that support them through normal business cycles, mergers, relocations, new ventures, retirement planning and more.

DIVERSITY OF NEED AND PEOPLE

A one-person law practice operating from a home office in the West Hills may not earn the gross revenue of Portland's larger downtown firms, but an end-of-year net of more than $500,000 presents ample reason to plan wisely for everything from tax returns to retirement. Likewise, in a restaurant, concerns such as payroll, tips and inventory are directly tied to day-to-day operations, and, if not handled correctly, can leave a restaurant open to everything – from IRS notices to employee discontent.

These are just two examples of how our work within the professional services industry group can vary. It is imperative for us to respond to each respective industry's demands, along with what each owner and management group needs.

When working directly with business owners and management groups, they soon discover that one of our greatest assets is our ability to be flexible, and to anticipate their future needs.

"BECAUSE NO TWO LAW FIRMS, DENTAL OFFICES OR RESTAURANTS ARE THE SAME, EACH OF OUR CLIENTS RECEIVE THE RESPECT, INSIGHT, AND DILIGENCE THEY NEED. THEY'RE WORKING TOWARD A UNIQUE VISION, AND IT'S OUR JOB TO GET THEM THERE."

Michael Lortz, SHAREHOLDER

WELL-ROUNDED SERVICES AND SOLUTIONS

Throughout our history, we have always prided ourselves on building lasting relationships, while also being aware that, in the eyes of our clients, we are only as good as the most recent service or piece of tax advice we provided.

In much the same way, our clients are also judged daily by the people they serve, from how they treat them, to the quality of their services.

By allotting sufficient time for each area of a client's business, we get to know everything about their operations and their culture, from what systems they have in place, to their personal goals.

When you examine the work of law firms, dental practices, wealth managers, restaurants, architects, creative firms and others, you see that their services culminates with a direct interaction with their customer. Sometimes, it's a person enjoying a special meal. Other times, it's a mother watching the dentist fill her child's first cavity. Everything reflects back to the owner and the business's reputation.

Our work is designed to protect this reputation by proactively making sure our clients' businesses are running smoothly, planning correctly, addressing compliance issues, protecting against fraud, and building toward their vision of success.

"WHEN YOU'RE OUT FOR A SPECIAL DINNER, YOU DON'T JUST JUDGE THE FOOD. YOU LOOK AT EVERYTHING: THE DÉCOR, THE FRIENDLY STAFF, HOW QUICKLY THE MEAL COMES OUT…YOU'RE TAKING IN THE WHOLE EXPERIENCE. WE'RE THE SAME WAY WITH OUR CLIENTS. WE'RE NOT JUST LOOKING AT THEIR RECEIPTS. WE LOOK INTO THE VERY CORE OF THEIR BUSINESSES AND MAKE SURE THEY MOVE IN THE RIGHT DIRECTION."

Doug Lovett, SHAREHOLDER

CONSISTENCY THROUGH CHANGE

Business owners and management groups continue to appreciate our ability to adapt, grow, and tailor our services around their true needs. Some clients have very capable tax staff in-house, and call upon us to support their higher level planning and estate needs. Others find themselves in situations where they need greater systematic oversight in order to mitigate risks ranging from compliance to end-of-year planning.

Across the board, our clients come to appreciate the fact that we are both consistent and flexible, and that no matter where they're at in their business cycle, they know exactly whom to call when the need arises, even if the nature of their calls change daily.