



Publicly Fit:

Building an Infrastructure
Ready for Growth

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“ Weaver’s depth of experience with private companies has led us to take a different view than many of our larger competitors when it comes to our Publicly Fit projects. Our competitors often work extensively with companies that are already public and they apply what they know from that work to their maturing private-company clients. Weaver takes a different approach. We start with a viewpoint that respects and appreciates entrepreneurial personalities and the level of commitment it takes to build a successful company from scratch.”

—Working with Weaver, page 11

What do we mean by Publicly Fit companies?

Our definition reaches well beyond those companies contemplating a public offering. In today's business environment, many private companies voluntarily choose to enhance their business operations and their compliance standards—to become Publicly Fit—because raising their business operations bar increases opportunities and enhances overall enterprise value. The benefits include:

- **Facilitating financial transactions:** Many lenders or other financial partners expect private companies to demonstrate the same level of rigorous reporting standards and controls as public companies.
- **Securing key partnerships or joint venture opportunities:** Private companies that demonstrate voluntary compliance with elements of public-company standards are more attractive potential business partners.
- **Increasing current value:** In the event of a merger or acquisition, private companies with documented, standardized business operations can close a deal more efficiently and at a greater enterprise value.
- **Securing top board members:** Many of the most experienced, talented business people insist on well-defined corporate governance policies and strong financial oversights before they will accept a board appointment.

- **Hiring top talent:** Likewise, many potential senior management hires also expect private companies to have governance and oversight policies that comply with public standards.
- **Protection from accusations of wrongdoing:** Private companies that voluntarily operate under the same standards as a public company can more readily establish that they are applying acceptable and appropriate standards in the event of a lawsuit or other legal action.

Weaver encourages our clients to think differently about building a more coordinated accounting structure capable of withstanding external scrutiny. There are simply too many transaction-based opportunities beyond an initial public offering (IPO) that invite this higher level of transparency and sophistication.

At Weaver, our experienced professionals work with private companies like yours every day and appreciate what you have built.

We understand the entrepreneurial point of view and we keep that view in mind as we help companies build a Publicly Fit infrastructure.

We strive to help our clients build a Publicly Fit infrastructure as soon as their individual company's growth has reached an appropriate level, which varies from company to company. In fact, Weaver can partner with you to move your company in the direction of a Publicly Fit infrastructure in incremental steps based on your needs. Properly preparing for external accounting scrutiny is a process that can take a year or even two or three years, which is why preparing early, even for private companies, is a must.

Becoming Publicly Fit in accordance with your company's own timetable, as opposed to in response to an event, benefits both pre-public companies and private companies hoping to grow their businesses beyond current levels.

What's different about Weaver's approach to building a Publicly Fit company?

Financial accountability is every company's responsibility—and it's just good business.

The Sarbanes–Oxley Act of 2002 (SOX) changed the governance landscape for all companies—not just public companies.

Why?

While the law specifically applies to public companies (those filing a Form 10-K), the rigorous reporting, accounting and internal control principles ushered in by SOX have become the accepted yardstick for measuring a company's level of sophistication. As a result, private companies that ignore SOX requirements may miss market opportunities.

At Weaver, we begin with the end in mind—and we adapt our approach to fit your company's needs and timeline.

For example, we work with many smaller companies that need to become Publicly Fit but have limited resources. We advise these companies through the process at a pace that fits their needs and their resources, beginning with their most pressing needs.

We create an overall plan with a solid foundation that builds on itself. We begin with your company's most pervasive infrastructure issues (those processes touched by the most people) and create scalable processes that address those issues first. Once this foundation is firmly in place, we move incrementally, using our exclusive building-block approach, through each of your more discrete systems and processes (those touched by fewer people and exposed to a higher degree of subjectivity).

This proprietary, systematic approach allows us to create an overall solution with the least disruption to your company.

Depending on your individual company's ongoing level of financial-reporting sophistication, Weaver can shorten the process of becoming Publicly Fit to just a few months, but costs increase as the timeframe shortens, and the strain on your company can be significant. That is why we much prefer phased-in implementation. This allows your company to put new processes in place and bring them to full functionality before moving forward to the next phases of this transforming experience. This type of effective change management helps ensure a smoother transition and keeps costs under control.

The road to becoming Publicly Fit involves several incremental steps, including:

- Enhancing financial reporting capabilities
- Implementing a risk assessment process
- Developing corporate governance practices
- Enhancing and strengthening internal controls and information technology systems
- Creating procedures compliant with Securities and Exchange Commission (SEC) reporting rules

Enhancing Financial Reporting

Understanding and valuing the importance of accurate and timely financial reporting is part of the cultural shift needed to move your company to the next level. At Weaver, we help your employees make this cultural shift.

Improving financial reporting begins with assessing your current internal resources, both personnel and technology. For example, does your company already have the experience and expertise required to meet public-company standards? If not, you will need to augment your financial team. This may require a shift in thinking for the founder, who may be accustomed to simply hiring a controller and keeping significant decision-making within a small group or as the sole function of the founder. Adding this new level of expertise will require a commitment from the founder to turn over important decision-making to a person who has not yet earned the founder's confidence. Additionally, these skills come at a high cost and may include some form of company ownership, such as stock options or other equity incentives, in addition to cash compensation.

At Weaver, we understand how difficult embracing this type of shift in thinking can be for entrepreneurs. We spend time proving the value of this change so the founder or founders fully understand how this more costly infrastructure is a necessary part of the building blocks for the company's future.

Additionally, from a process and technology perspective, your company's current reporting capabilities may be too limiting and significant changes may be required. Many private companies are accomplishing current reporting tasks through many manual and drawn-out processes, which will no longer suffice for a Publicly Fit company. Not only are these types of processes too onerous, but they do not provide the flexibility needed to analyze data in different ways and gain business intelligence.

Within a mature internal infrastructure, a financial team typically includes several members, each with a different purpose within the accounting and reporting function. These members work with consistently applied accounting policies and procedures and, based on the accounting system configuration, are able to dissect and analyze data from their different perspectives. This allows the company to configure reports for multiple purposes, such as for internal decision-making or external reporting requirements.

CHALLENGE | Moving from being a \$250 million company to a \$1 billion company in 18 months. Weaver recently spent nine months working with a company posturing to grow by four times its current size. While management's leadership was strong, the company's growth prospects were restricted because it lacked critical standardized, reoccurring financial practices.

SOLUTION | Weaver assisted our client with documenting and recreating detailed asset records, which were missing due to a series of earlier acquisitions. Then we worked side-by-side, on site for nine months, with our client's management team to document accounting and operational process gaps and to design an overall plan to fill those gaps and enhance the company's overall processes. Ultimately, we divided management team responsibilities into segregated work-flow functions that were orderly, systematic and SOX compliant. Our on-site team, including a manager and three other professionals, also worked directly with the company's leadership to assign responsibilities within the accounting department and other departments. Then we helped fully implement the new, scalable policies and procedures. Now our client is on the way to reaching its \$1 billion goal.

Implementing Risk Assessment Processes

While daily business risks are the same for both public and private entities, the way risk assessment is used and measured can be significantly different. The purpose of risk assessment is to make informed decisions within your company's risk-tolerance levels. Public companies, with their mature internal infrastructure, focus on understanding and fully mitigating the company's risk. Typically, private companies spend too little time on assessing risk and evaluating adequate mitigation, often preferring a more seat-of-the-pants approach based on experience.

However, implementing strong risk-assessment strategies within a public entity's or a mature private company's corporate-governance structure not only makes good business sense, but it's often expected by outside investors and potential acquirers. Management is accountable to the board of directors for the documentation of the company's risk appetite/tolerance and how it is used and communicated to the company's various audiences.

At Weaver, we work with our clients to develop a risk-assessment process that will pass scrutiny and inspire confidence with all target audiences, such as shareholders or private investors, as well as regulators.

CHALLENGE | Weaver was contacted by a financial services company that had received a management letter comment from its external audit firm, which indicated that based on the company's size and complexity level in its regulated industry, it needed to put a formal risk assessment process in place and consider implementing an internal audit function. The company's external audit firm was restricted from assisting with these efforts due to regulatory guidelines and independence rules. In these situations, companies are often faced with one of two solutions, hire the expertise to do the work in-house or hire a second firm with internal audit expertise and capabilities to perform the work.

SOLUTION | After being recommended to the company by its external audit firm, Weaver performed an entity-level and process-level risk assessment across the company. This included identifying the company's risk appetite and risk tolerance levels and providing a documented risk-response plan.

As part of Weaver's solution, which included a thorough interview and survey process with key members of the company's management team, Weaver created a customized risk-response plan and proposed a three-year internal audit plan that was modified and accepted by the company's audit committee. Then, Weaver helped the company hire a manager-level internal auditor who was responsible for implementing the plan and for the ongoing internal audit function.

Within a year, the company had satisfied the external audit firm's requirements and had a fully implemented risk-response plan. Weaver maintained a co-sourcing relationship with the company to perform certain internal audit activities. The risk assessment and internal audit processes assisted the company with compliance with FINRA (Financial Industry Regulatory Authority) guidelines. The company eventually merged with another private company and went public. Having a mature risk assessment and internal audit function was a strong platform that enabled the company to achieve its objectives.

Developing Corporate Governance Practices

Another significant cultural shift for private companies is developing appropriate corporate-governance practices. This structure, which includes a reliance on outside independent directors and the division of power and responsibilities to different members of the management team, is not typically found in a private company.

Many private companies are built on a hub-and-wheel structure, where all parts of the company report to the founding hub, the CEO's authority. These structures lack the formalization of entity-level control processes that set the tone at the top and expectations for individual performance and behavior across the organization, including a code of ethics, delegation of authority, human resources policies and core values.

In a public company, the board of directors, representing shareholders' interests, is the authority. Company management is accountable to the board, which should be an independent entity but not disconnected from the management structure. The executive leadership team is responsible for establishing and maintaining appropriate entity-level controls to reinforce an empowered and ethical environment. This starts with effective tone at the top.

At Weaver, we help your company implement this more accountable governance structure through hands-on work with current company management and the careful development of an appropriate screening process for hiring individual board members and establishing the board's overall executive structure. We understand the importance of proper recruitment and of establishing a robust board structure with suitable entity-level controls.

CHALLENGE | An industrial manufacturing and design group client was looking for a capitalization strategy that would improve the company's value and make it attractive for outside investment so the owner could sell a portion of the company to recoup his personal investments.

SOLUTION | Weaver identified specific company-level governance processes that needed to be in place before outside investors would want to make a significant investment in the company. While the company was highly successful, the decision-making process was concentrated with the owner. Weaver began developing a truly autonomous management team and created a formalized board of directors. As part of this process, Weaver helped the company's owner write a job profile and recruit a chief operating officer (COO), a role that had previously been handled by the owner. Weaver also participated in the further development of specific financing and reporting skills for the company's current controller so she could assume the role of chief financial officer (CFO).

We also worked with the owner to identify the board requirements for an appropriately diverse and effective board of directors, including recruiting independent trusted advisors with specific expertise. Then Weaver planned and initiated a formal reporting structure, including a governance calendar to hold specific management meetings, including biannual strategic planning, quarterly results-focused meetings and semi-annual budget-focused meetings. As a result of the new governance practices and the enhanced management team, our client had a business that was no longer dependent on one individual, which enabled him to sell 45 percent, a non-controlling interest, to a large private equity firm, while also distributing ownership participation to his COO and CFO.

Enhancing Internal Infrastructure

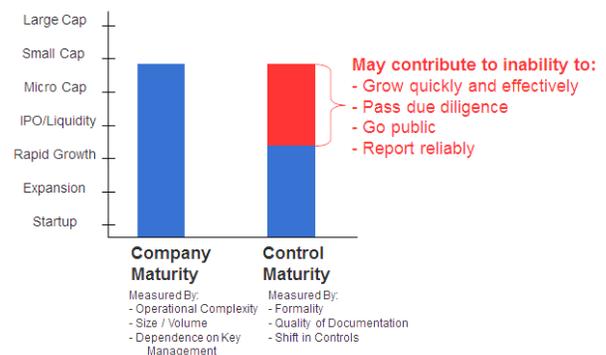
Few private companies have developed the level of scalable technology-reliant procedures, personnel processes or business processes needed to meet the minimum requirements of a public company. Effective business process control design along with supporting information technology, as well as specifically defined roles for personnel, is the foundational element of a mature internal infrastructure. Additionally, it must be scalable to support growth and it must be reliable.

For a private company, this cultural change may represent a significant expense. Many private companies operate with slim information technology support, open security and inconsistent backup procedures. Additionally, they seldom adequately identify and implement internal controls and evaluation processes for the majority of their financial transactions, such as sales to cash, purchase to pay, inventory control, personnel payroll reporting and financial reporting.

By implementing, proving out and communicating a strong and effective environment of corporate governance through entity- and process-level internal controls, companies of all sizes can realize significant benefits. These benefits do not require full compliance with SOX legislation.

At Weaver, we identify your critical technology-related applications and associated controls and put entity-specific policies and procedures in place to ensure the continuity of those procedures. Whether SOX compliance will be a requirement for your company at some point or not, these initial steps can provide numerous benefits associated with strong corporate governance and improved operational effectiveness.

Lagging Control Maturity...Has a Cost



CHALLENGE | A growing company with a legacy accounting system had manual internal control processes that relied on trusted individuals and the company had reached a level of growth and future potential that required more robust internal controls built to synchronize within a more advanced enterprise resource planning (ERP) solution. While the company's infrastructure had been adequate for its needs up to this point, growth experienced over the prior two years resulted in an increasing reliance on a few trusted individuals and a number of workarounds and patchwork solutions that were increasingly the cause of unacceptable inefficiencies.

SOLUTION | Weaver worked with the new management team, which was brought in to ready the company for future expansion, to identify the increased system capabilities and functionality the company needed to provide the necessary internal controls, automation, sophistication and transparency, which required a much more sophisticated ERP system that was fully customizable, configurable and scalable. Working side-by-side with our client, Weaver evaluated the current design of the internal controls for key business cycles, identified control gaps, and made recommendations to strengthen the internal controls through segregation of duties and automation. The Weaver team performed business-process mapping to document the specifications and data elements required for the various departments of the company to facilitate effective management and efficient operational processing across the business. This documentation was used to strengthen the internal control design and select a new core ERP system that would facilitate future growth and improve business processes. This solution helped the company automate manual procedures, implement preventative controls, customize data, enforce segregation of duties through access, improve data security and build better management reporting.

Accommodating Compliance Requirements

CHALLENGE | Helping a private equity firm, which had invested in a fast-growing retail company, recoup its investment through preparing the growing company for an initial public offering (IPO). The fast-growing company already had accurate routine financial reporting through its chief financial officer and its strong controller, but the move to a public company would require more rigorous reporting.

SOLUTION | Weaver determined that, as a public entity, the company needed to add a third financial reporting position, hiring someone with the compliance and financial reporting knowledge needed to handle public filings. Weaver helped the company identify the skills needed and we participated in the interview process to find a candidate with the appropriate skills who would complement the other two financial team members. Additionally, Weaver worked side-by-side with the new financial reporting team to prepare the S-1 filing for the Securities and Exchange Commission (SEC), as well as the company's first annual report (10-K report) and proxy statement. Then Weaver assisted our client in working with its external auditors to satisfy that firm's points of concern. Generally, this work included identifying and implementing an automated consolidation and financial statement system and software for EDGARizing the final submission of the public reports. Weaver's hands-on help resulted in the company smoothly transitioning to its new SEC reporting requirements and doing it with the least amount of disruption and expense.

For companies with IPO aspirations, future financial reporting must be compliant with SEC reporting rules and regulations, which can be onerous. For example, the SEC requires compensation disclosure for certain of your most highly compensated personnel. While private companies can generally isolate top management pay, this may not fully represent your company's most highly compensated staff members. More robust reporting capabilities, including the ability to view data from different perspectives, are required.

For publicly registered entities, financial reporting also requires timely filing of a multitude of required SEC disclosures, such as press releases (8K) for timely disclosure of material events. As a private entity, the founder or members of a management team may routinely finalize handshake deals that materially impact the company's future but are not disclosed externally. As a public company or one held to a public-company standard, those deals must be quickly disclosed to the shareholders and the public. This represents another huge cultural shift for many companies.

Additionally, private companies often rely on their auditors to accumulate appropriate data and prepare required disclosures. However, as a public company or a sophisticated private entity, your company cannot depend on your outside external auditors for fundamental management functions—and financial reporting is fundamental. Such reliance would not be acceptable to regulatory agencies or be in compliance with independence rules. At Weaver, we regularly work with private companies faced with revamping significantly inadequate financial reporting and accounting structures that might have been adequate in the past but will not overcome the regulatory hurdles facing a more mature company with public reporting responsibilities. Our team will expertly evaluate your current systems and recommend the most appropriate way to restructure them.

Our Team



Alyssa G. Martin, CPA

Alyssa leads strategic, multi-disciplinary solutions for Weaver's public company and large clients nationwide. Previously the partner in charge of risk advisory services for the firm, Alyssa now leverages her rich experience to assist public and large private companies in managing risk, establishing governance and strategy, preventing fraud, ensuring compliance and improving operations. Her Publicly Fit emphasis is in the areas of operational analysis, risk management, internal audit, quality assurance reviews, fraud prevention, information technology audit, business management consulting, strategic planning and technology consulting for public sector, private sector and publicly held companies. She has been involved in many SOX-

compliance projects and in managing and performing internal controls and process improvement work for a wide variety of companies. She has focused throughout her career on enterprise risk management, internal audit, fraud prevention, IT audit, operational analysis, business management consulting, strategic planning and technology consulting for private and publicly held companies and government entities.

Alyssa has led multiple engagements designed to establish effective strategies for companies desiring to complete an initial public offering. She regularly consults with both public and private enterprises with revenues ranging from \$25 million to \$2 billion. Much of that work involves collaborating with management teams on growth strategies and board of directors' matters, as well as working with audit committees involving governance and with private equity firms to coordinate strengthening management activities as new requirements are undertaken. She also has significant experience with management and risk advisory matters, internal audits, information technology advisory work and ERP system implementations. Alyssa is also the author of a large number of articles, including many that specifically address Publicly Fit reporting and auditing matters.



Melvin F. "Trey" Hunt III, CPA

With more than 17 years of experience in public accounting, Trey currently leads Weaver's national practice serving middle-market companies. He has focused throughout his career on audit and review engagements for clients in the energy and manufacturing industries. Trey's experience also includes leadership for engagements in private and publicly held business enterprises, including the lead manager role on multiple Fortune 1000 engagements.

Trey's specific work in the Publicly Fit arena includes the application of stock-based compensation rules, including impact of modifications, performance acceleration, claw-back features and valuation. He also has experience with multiple SEC filings, including: S-1, S-3, S-4, S-8, 10-K, 10-Q and 144A.



Phil Ilgenstein, CPA

Phil has more than 10 years of experience providing audit and assurance services for a wide variety of clients, ranging from small venture capital and private equity-backed startups to Fortune 150 and multinational corporations. His experience includes overseeing audits with engagement teams of three to more than 25 staff and specialists.

Phil's clients have operated in industries including semiconductor design and manufacturing, telecom, heavy or industrial equipment, general manufacturing, oil and gas (primarily upstream exploration and production), consulting, software, fund management and real estate.



Brian J. Thomas, CISA, CISSP, QSA

Brian Thomas has more than 20 years of experience in management consulting, IT advisory services and leadership of large, complex engagements for many of the firm's largest clients. Before assuming leadership of Weaver's entire advisory service line, Brian managed the IT Advisory Services team in delivering IT-focused solutions such as service organization controls (SOC) reporting, system integration, information security, Sarbanes-Oxley (SOX) compliance assistance, IT audits and IT project management. Brian has served clients in the technology, upstream oil and gas, downstream refining, chemical manufacturing, E&C, oilfield services, utilities and technology service provider industries.

Brian's internal controls experience includes both advisory services in support of management assessments and support of external audit teams, including four Fortune 500 organizations. His internal audit experience includes risk assessment, audit planning, execution and reporting at five Fortune 1,000 organizations. Brian is particularly experienced with companies in the technology, consumer electronics, upstream oil & gas and utilities (power generation and transmission) industries.



Dale J. Jensen, CPA, CFE

With more than 17 years of audit experience, Dale is the partner-in-charge of Weaver's SEC Practice Group. The members of this group regularly work with both pre-IPO companies and currently public companies to review documents and provide ongoing support. Dale has developed a significant practice concentration in audit, review and compilation services. His industry experience includes audit engagements for oil and gas entities, higher education, privately and publicly held business enterprises, local governments and nonprofit institutions.

Dale works extensively with numerous public companies and with larger private companies, particularly within the technology, energy, oil and gas, manufacturing, distribution and insurance industries. Dale and the entire SEC Practice Group team are directly involved with client engagements, which add efficiency and effectiveness for clients dealing with both common and uncommon issues. In addition to the review of SEC filings, Dale has specifically related experience in mergers & acquisitions, accounting for fair value measurements, preparation of hedge documentation for derivative instruments and various other matters for private, public and non-profit companies.



Joseph R. "Jody" Allred, CPA, CITP, CISA

Jody has more than 18 years of public accounting experience, including five years in Weaver's Assurance Services practice and more than seven years in the firm's Advisory Services practice

His specialized practice areas include internal audit, both outsourced and co-sourced, internal control and business process improvement consulting, audits of service organization controls, and other accounting and audit services. Jody manages SOX compliance and outsourced internal audits for organizations ranging from \$60 million to \$2 billion.

Jody has significant experience in the following industries: oil & gas exploration and production (upstream), manufacturing, distribution, institutional healthcare, construction, technology, professional employer organizations and not-for-profit organizations. He is the author of several articles focused on risk management and internal controls. He is also an active member of numerous accounting groups focused on auditing issues.



John M. Weihe, CPA

John Weihe has more than 14 years of public accounting experience, including 10 years of Big Four experience. He joined Weaver in 2014 from Ernst & Young, LLP. John has focused his career on serving clients in the energy, oilfield services, manufacturing, software, real estate and construction industries, including having served in lead management roles for multiple Fortune 1000 companies. John has significant experience with integrated audits under PCAOB standards, international engagement coordination, revenue recognition accounting, impairment assets, stock-based compensation, inventory accounting and SEC filings. He also has experience performing advisory services such as Sarbanes-Oxley compliance evaluations.

John is an active local member of AICPA and TXCPA. He earned a Master in Professional Accounting and a Bachelor of Business Administration from the University of Texas at Austin.

Working with Weaver

Weaver's depth of experience with private companies has led us to take a different view than many of our larger competitors when it comes to our Publicly Fit projects. Our competitors often work extensively with companies that are already public and they apply what they know from that work to their maturing private-company clients. Weaver takes a different approach. We start with a viewpoint that respects and appreciates entrepreneurial personalities and the level of commitment it takes to build a successful company from scratch.

For example, we fully understand and value the various versions of the hub-and-wheel structure used by most private companies, which typically means authority and accountability are focused within a small group or even a single individual. Since we fully understand this structure, we can immediately begin to offer practical recommendations for change that can be more easily absorbed by the company.

We are empathetic, not critical, of your current processes; and we fully understand the level of commitment it takes from you to revamp your long-standing processes in order to move to the next level of business sophistication.

As a Weaver client, you also gain access to our top partners who are hands-on, day-to-day at every level of your project. They have the depth of experience needed to immediately spot and efficiently resolve potential issues that could slow down your company's progress toward becoming Publicly Fit.

As a trusted and respected national firm, our work with your company also fits into other outside projects or reviews. For example, we often work in partnership with the nation's largest accounting firms, where our work is fully respected by our peers and is typically more cost effective.

If the time has come to move your private company to the next maturity level, you can begin the process with an assessment from a Weaver team with specific knowledge of your industry's distinctive challenges. We'll begin by helping you decide which members of your management team will be involved, identifying your best sources of information and documentation, determining the timeframe you are willing to allow to convert your processes, and establishing a detailed plan aimed at accomplishing those goals within the allotted timeframe.

While the process can be rigorous, becoming Publicly Fit is just good business for most growing mid-sized companies.

What you can expect as one of our clients:

- **The resources of a national or international firm at a fair and reasonable cost.** Our seven Texas locations, combined with strategic national and international affiliations, allow us to offer you the resources of a large firm without the fee structure required to support national or international overhead.
- **A commitment to your complete satisfaction.** Our mission is to help you identify and achieve your financial goals and to deliver the professional accounting services you need to add measurable value in the pursuit of those goals.
- **Ongoing, exceptional client service.** The specifically selected members of your engagement team, including our senior management, will communicate with you in a timely and courteous manner at all times. In fact, to bring your firm's processes up to the Publicly Fit level, members of our engagement team will work with you, side-by-side, in your offices during the most critical aspects of the process.
- **A deep understanding of your needs.** As your professional services provider, we have a responsibility to learn your business and understand your needs. To accomplish this, we regularly supplement our already extensive knowledge of both private and public companies with the use of comprehensive, industry-specific research tools to identify and address the issues facing you.
- **A proactive stance on your behalf.** We strive to help you reach your financial goals by keeping you informed and implementing necessary process changes to accommodate relevant law changes or to help you seize new financial opportunities and conquer challenges along the way.

About Weaver

Weaver is a national full-service accounting firm with offices coast to coast. Weaver serves clients from Fortune 500 multinational companies to start-ups, local and state government, and nonprofit organizations. The firm is particularly well known in the financial services, energy, manufacturing, construction, real estate, health care and government sectors.

Weaver's services go beyond traditional assurance and tax services to include risk advisory, IT advisory, cybersecurity, due diligence, valuation, energy compliance, forensics and litigation services, as well as specialty tax services such as international tax, state and local tax and private client services.



Our Locations

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