

# PROPELLING GROWTH WITH ACCOUNTING ADVISORY SERVICES



In a competitive business landscape, companies often face challenges in managing financial growth and stability. As they scale, the need for skilled financial oversight becomes critical. When growth-aware clients need outsourced accounting, controllership or CFO services to support their trajectory, they look to Weaver’s accounting advisory team for strategic guidance and ongoing support.

## WHY WEAVER?

Our experienced and knowledgeable professionals provide support for your specific journey, whether that’s to greater profitability, pre-IPO or pursuing other business goals. We fill the gaps – no matter the level or quantity of tasks – from back-office assistance in daily transaction processing to monthly and year-end reporting, regulatory filings and more complex C-level tasks including outsourced controller and CFO roles. Whether you need to contract some or all of your accounting functions, our team can provide everything to meet your accounting and CFO needs and exceed your business goals.

## INTEGRATED FINANCIAL SOLUTIONS

Our scalable accounting advisory services enhance your existing accounting and finance functions when and where you need them most.

### ACCOUNTING ADVISORY SERVICES

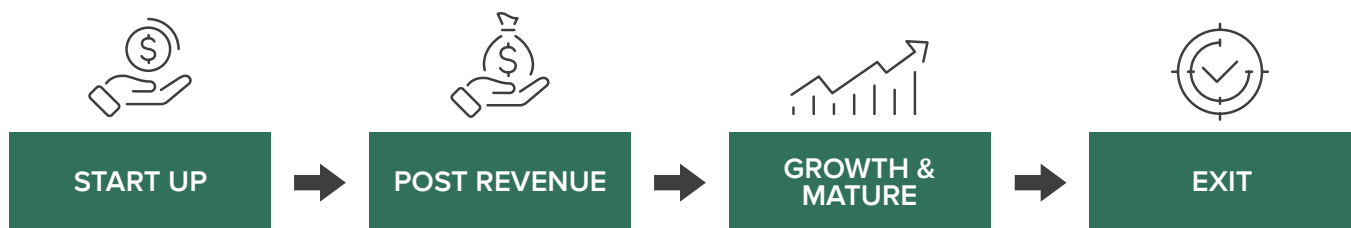
Technical accounting for your next stage of growth

- ▶ U.S. GAAP financial statements
- ▶ Interim CFO
- ▶ Technical accounting
- ▶ Spend management
- ▶ Buy- and sell-side due diligence support
- ▶ IPO readiness
- ▶ Audit readiness
- ▶ Outsourced accounting
- ▶ Financial planning and analysis
- ▶ Monthly financial reporting
- ▶ Fractional CFO
- ▶ Business strategy consulting
- ▶ Standard operating procedures documentation
- ▶ KPI development and tracking

### ACCOUNTING ADVISORY TAX SERVICES

Comprehensive tax compliance and reporting solutions to meet regulatory demands and support growth

- ▶ Monthly, quarterly and annual tax basis accounting
- ▶ Maintenance of general ledger, including reconciliation of accounts
- ▶ Monthly bill-pay services
- ▶ Advisory services regarding business performance
- ▶ 1099 preparation, compliance and consulting services
- ▶ Payroll tax return, W-2 preparation and compliance services
- ▶ Payroll related compliance and consulting, including assistance with IRS notice resolution for payroll related issues and benefits consulting
- ▶ Coordination with tax department for tax projections and tax planning





## WHAT OUR CLIENTS SAY

“Our needs as a company are addressed and handled professionally and expediently ... There is a cohesive team attitude throughout Weaver, whether it be the bookkeeping or tax preparation.”

– Weaver client

## ABOUT WEAVER

Weaver is a national accounting and advisory firm with offices from coast to coast. But we're not an ordinary accounting firm. We have an unwavering commitment to our clients' success, acting with integrity and always striving to transcend expectations. We are nationally ranked by both INSIDE Public Accounting (IPA) and Accounting Today, including recognition as a Best of the Best firm by IPA in 2024.

### KEY CONTACTS:

#### **CHAD VALENTINE, CPA**

PARTNER-IN-CHARGE  
ACCOUNTING ADVISORY SERVICES  
O: 432.570.3138  
CHAD.VALENTINE@WEAVER.COM

#### **PETER LEE, CPA, CGMA**

PARTNER & WEST COAST COMMERCIAL  
PRACTICE LEADER  
O: 310.382.5390  
PETER.LEE@WEAVER.COM

#### **JENNIFER DANG, CPA, CGMA**

PARTNER  
ACCOUNTING ADVISORY SERVICES  
O: 310.817.0389  
JENNIFER.DANG@WEAVER.COM

#### **WENDY KWONG, CPA, MBT**

PARTNER  
ACCOUNTING ADVISORY SERVICES  
O: 626.389.1240  
WENDY.KWONG@WEAVER.COM

#### **KOLETTE LEBLANC, CPA**

PARTNER-IN-CHARGE  
ACCOUNTING ADVISORY TAX SERVICES  
O: 337.443.9504  
KOLETTE.LEBLANC@WEAVER.COM

#### **STUART LAVENDER, CPA**

PARTNER  
ACCOUNTING ADVISORY TAX SERVICES  
O: 212.896.1935  
STU.LAVENDER@WEAVER.COM