

The BGW Process

Get To Know Each Other

- About You
- About Us
- Identify Value
- Setting Expectations
- Value Alignment

Where Are We Today

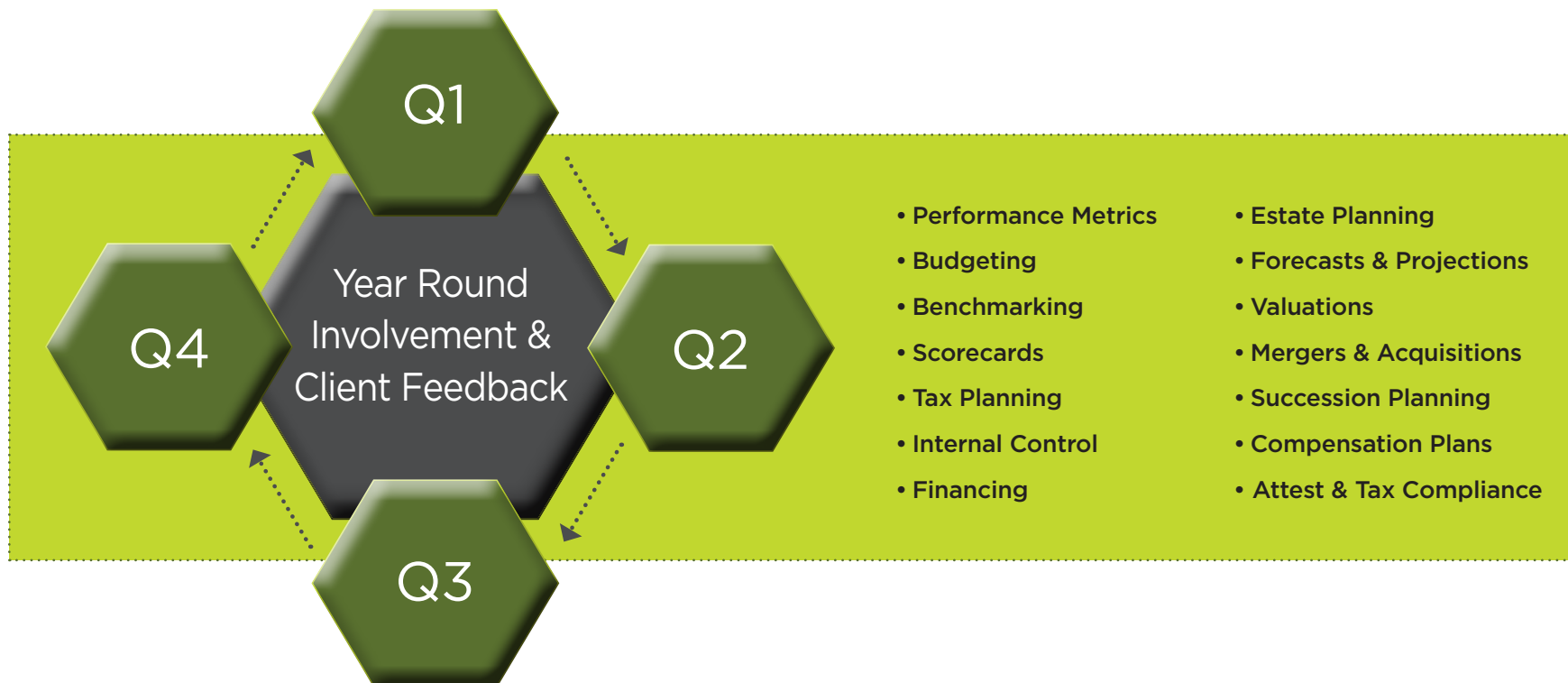
- Current Assessment
- Goal Setting
- Quantitative
- Qualitative
- Diagnostics

Planning

- Service Scope
- Set Start & Completion Dates
- Establish Service Team
- Ownership Concerns
- Establish Strategies

Execution

- Attest & Tax Compliance
- Mergers & Acquisitions
- Strategic Planning
- Succession Planning
- Routine Updates
- Estate Planning
- Tax Planning



Helping Business Owners Achieve Their Vision

Our Purpose

To make a difference in the lives of our clients, our team, and our community.

Our Niche

We are a local CPA firm which helps privately held businesses and their owners save money, make money, and stay out of trouble.



CLIENT TESTIMONIALS

"The firm helps me look forward – not just backwards."

"The firm is relational rather than transactional – they look at the full business agenda."

"The firm has saved me over \$100,000, compared to other accounting firms we've worked with."

www.trustbgw.com

VALUE depends upon the achievement of VISION.