

Advisory Services

When You Need More Than an Accountant

According to a survey by tech giant, Accountex, 72% of small business owners changed accountants because their advisor did not offer proactive advice. A separate survey by the American Institute of CPAs showed that 78% of accountants feel they should be preparing their clients for the complex challenges of the future marketplace. Unfortunately, too many CPAs are stuck in the rut of reacting to issues instead of catching them ahead of time. If that sounds like your situation, then maybe it's time to reevaluate your expectations of your accounting firm.

Empowering You to Make the Right Business Decisions

Understandably, most small business owners are eager to receive anticipatory guidance and advice from their accountant. At White Nelson Diehl Evans LLP, we go beyond technical accounting to analyze your performance and offer recommendations on actions you can take to position your business for a stronger future. Essentially, we give you the tools to make the best decisions for you and your business. Our goal is to become your trusted advisor by learning as much as we can about your industry, adjusting our processes to handle your growth, maintaining an open line of communication, and standing with you through the ups and downs of the economy.

The WNDE Difference

White Nelson Diehl Evans LLP is the premier regional CPA firm in Southern California providing advisory services to businesses, management, government and nonprofit organizations. For more than 90 years, we have been offering guidance on critical decisions that help our clients identify opportunities, reduce risk, trim costs, improve profitability and ultimately reach their goals.

To learn more about our proactive advisory services, contact a WNDE team member today.

WHAT CAN YOU EXPECT?

WNDE offers thorough and professional services tailored to each client's individual needs, including:

- **Business/Management Support Services**
 - › 401(k) employee benefit plan ERISA audits
 - › Accounting system design, setup, and training
 - › Agreed-upon procedures engagements
 - › Budget preparation and analysis
 - › Budgeting, bookkeeping and cash flow management
 - › Cash flow forecasts and projections
 - › Cost-containment strategies
 - › Growth planning and funding
 - › Internal control studies
 - › Merger & acquisition support
 - › Payroll, property, and sales tax advice
 - › Policy development
 - › Exit & succession planning
- **Cybersecurity Consulting Services**
 - › Assess vulnerabilities & determine compliance
 - › Recommendations & implementation
 - › Incident response plans
 - › Employee cyber-security training programs
 - › Monitoring & managed security services
- **Government Advisory Services**
 - › Business license tax reviews
 - › Design of accounting procedure manuals
 - › Fraud investigations
 - › Human resource and payroll services
 - › Internal control reviews
 - › Litigation support services
 - › Economic development services
 - › Tax consulting for employee compensation and benefit plans
 - › Transient occupancy tax and other franchise reviews
- **Nonprofit Advisory Services**
 - › 403(b) pension plan/ERISA audits
 - › Compliance and program specific audits
 - › Financial audits applying government auditing standards
 - › Form 990 preparation and compliance
 - › Fraud studies, prevention, and detection
 - › Internal controls studies