Dopkins & Company, LLP
CERTIFIED PUBLIC ACCOUNTANTS AND CONSULTANTS

PURCHASE PRICE ALLOCATION VALUATION SERVICES

Tax and Financial Reporting for a Growth Strategy

YOUR BUSINESS NEEDS

For many businesses, a key strategy is growth through targeted acquisitions. While such a strategy, when properly executed, can be an excellent way to grow profits and create new opportunities for owners and employees, it can also present challenges from a tax and financial reporting standpoint.

Key among those challenges is determining the values of acquired assets, such as customer lists, trademarks and employment agreements, which must be reported for both tax and financial reporting purposes. Valuation of these assets can be challenging, as every transaction is unique and there is often little market data that can be used as an indicator of value.

OUR SOLUTION

Dopkins & Company's professionals are well-versed in the accounting and valuation guidelines that apply to business combinations for both tax and financial statement presentation purposes.

In an era of regulatory change and dynamic business models, financial reporting services must be equipped to handle complex business issues down to the smallest detail. Based on our knowledge of valuation processes and financial accounting, and on our experience with auditors and users of financial statements, our professionals are at the leading edge of development of analyses to assist with our clients' impairment testing and to support their financial reporting.

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YOUR BUSINESS VALUATION TEAM

FOR MORE INFORMATION ABOUT DOPKINS BUSINESS VALUATION SERVICES, CONTACT:

Brendan P. Brady CPA, CVA

Director, Assurance Services Group ▪ bbrady@dopkins.com

Brendan leads assurance engagements as well as internal control projects in a wide range of industries. He spends a significant portion of his practice on transactional advisory consulting services for privately held and family-owned business.

Thomas J. Emmerling, PhD, CFA, CVA

Partner, Dopkins Capital Advisors ▪ tjemmerling@dopkins.com

As the Partner-in-charge of Dopkins Capital Advisors, Tom counsels clients across a wide variety of industries in their strategic planning and execution of divestiture transactions. His proactive approach aids clients in the complex and often lengthy process as they prepare to transition their businesses to new ownership.

Teresa M. Majors, CPA

Partner, Tax Advisory Group ▪ tmajors@dopkins.com

Teresa works with local public and private companies providing assistance with tax compliance, tax provision issues, Sarbanes-Oxley compliance, and FIN 48 implementation. She has broad based experience including working with both public and private companies and their executives and owners. She has extensive experience with multi-state corporations, consolidated return issues, mergers and acquisitions, and tax provision issues.

Albert A. Nigro, CPA, CVA

Partner, Tax Advisory Group ▪ anigro@dopkins.com

Al provides accounting, tax, outsourced accounting and consulting services for privately held companies, and consults on: business start-up and entity formation, financing coordination, design and implementation of financial accounting and reporting systems, income tax planning, estate tax planning, succession planning and business valuation.

Robert E. Pollock, CPA, CVA

Partner, Tax Advisory Group ▪ rpollock@dopkins.com

Bob's practice has covered many industries, with a primary focus on tax and financial matters encountered by closely held business operations and their owners. He has significant experience dealing with federal corporate income, federal personal income, state and local income, estate and gift and sales tax matters.

Stephen C. Studley, CPA, CFP, ChFC, CLU

Director, Tax Advisory Group ▪ sstudley@dopkins.com

Steve provides income tax planning, accounting and consulting services to a variety of clients and industries. While he serves clients in many different industry sectors, he specializes in servicing physicians and medical groups and practices.

Gregory J. Urban, CPA, CVA

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Greg's main focus is on providing tax consulting, compliance and valuation services to privately held businesses and their owners. He has extensive experience advising clients on complex tax compliance issues, including tax credit optimization, mergers and acquisitions. In addition, Greg performs and consults on a variety of business valuation engagements, including valuations relating to transfer tax issues and purchase price allocation issues.

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