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.

BUILD. PROTECT. TRANSFER WEALTH. **WITH DOPKINS.**



200 International Drive ▪ Buffalo, NY 14221 ▪ 716.634.8800 ▪ FAX 716.634.8987 www.dopkins.com

Dopkins & Company, LLP
CERTIFIED PUBLIC ACCOUNTANTS AND CONSULTANTS

YOUR BUSINESS VALUATION TEAM

FOR MORE INFORMATION ABOUT DOPKINS BUSINESS VALUATION SERVICES, CONTACT:



Brendan P. Brady CPA, CVA®

Director, Dopkins Capital Advisors LLC ▪ bbrady@dopkins.com

Brendan oversees the day-to-day execution of exit planning, business valuation, transaction due diligence, and quality of earnings services. With more than 20 years of experience as a CPA advising clients across a wide range of industries, he works closely with business owners and management teams to assess financial performance, identify key value drivers, and prepare companies for successful acquisitions and divestitures. Brendan advises both buyers and sellers throughout the transaction lifecycle, helping clients evaluate opportunities, navigate complex financial considerations, and execute successful transactions.



Thomas J. Emmerling, PhD, CFA®, CVA®

Managing Director, Dopkins Capital Advisors LLC ▪ tjemmerling@dopkins.com

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.



Albert A. Nigro, CPA, CVA®

Executive Vice President, 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.



Gregory J. Urban, CPA, CVA®

Executive Vice President, Tax Advisory Group ▪ gurban@dopkins.com

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.

© Dopkins & Company, LLP