

AUDIT, ACCOUNTING AND TAXATION SERVICES ARE AT THE HEART OF WHAT WE DO AT CBM. CLIENTS COUNT ON US TO BE THOROUGH AND EFFICIENT, KEEP OUR EYE ON THE BIG PICTURE, SHARE OUR INSIGHTS QUICKLY AND CLEARLY, AND BE RESPECTFUL OF THEIR TIME.

WE WORK WITH PRIVATELY HELD BUSINESSES, NOT-FOR-PROFIT ORGANIZATIONS AND INDIVIDUALS IN THE WASHINGTON, DC METRO AREA, AS WELL AS THROUGHOUT THE MID-ATLANTIC REGION. OUR TECHNICAL SKILLS ARE HIGHLY REGARDED, AND WE ARE WELL KNOWN FOR OUR SPECIALIZED EXPERTISE IN THE AUTOMOTIVE, NOT-FOR-PROFIT, CONSTRUCTION, AND REAL ESTATE ARENAS.

OUR PRINCIPALS ARE PERSONALLY INVOLVED IN ALL AUDIT, ACCOUNTING AND TAX ENGAGEMENTS. WE VALUE OUR CLIENT RELATIONSHIPS AND PRIDE OURSELVES ON BEING ACCESSIBLE AND RESPONSIVE TO ALL OF YOUR NEEDS.

Since 1921, CBM has been privileged to serve businesses, not-for-profit organizations and individuals who want CPAs and business advisors who truly look out for their best interests. We believe it is our job to help clients reach their highest aims by providing the financial expertise they need and the thoughtful attention they deserve.

You're the reason we're here. We look forward to helping you succeed.

Our services include:

- Financial Statement Audits, Reviews & Compilations
- Tax Return Preparation
- Tax Planning & Transactional Analysis
- Representation in Tax Examinations
 - Forensic Examinations
 - Litigation Support
 - Business Valuations
- Operational Consulting
- Estate & Gift Planning
- Trust Accounting
- Financial Planning
- Benchmarking/Trend Analysis
- Agreed Upon Procedures
- Business Succession Planning
- Merger & Acquisition Support & Analysis
- Wealth Management
(provided through CBM Financial Services, LLC)
- Investment Advisory & Insurance Services
(provided through CBM Financial Services, LLC)

GROWTH



Councilor, Buchanan & Mitchell, P.C. 7910 Woodmont Avenue, Suite 500, Bethesda, MD 20814
P: 301.986.0600 X: 301.986.0432 www.cbmcpa.com





We partner with you to foster your success. Whether it's an audit, accounting or tax engagement, we're by your side.

Audit & Accounting

We carefully plan, supervise and review our work to ensure quality. We match our services to your needs.

Audits, Reviews & Compilations. When an audit is required, we examine your financial statements for the purpose of rendering an opinion on the presentation of the company's financial position and operating results. A review engagement provides a lower level of assurance, and a compilation merely reflects the financial transactions as they currently exist in the organization's records.

Of course, we also prepare financial statements, determine disclosures and consult on transaction measurement and reporting.

A-133 Audits. CBM is well versed in the requirements and testing required by Government Auditing Standards and OMB Circular A-133. Our professional staff can help you fine-tune your internal controls to minimize the risk of future audit findings by the federal government.

Employee Benefit Plan Audits. Many defined benefit plans, defined contribution plans, profit sharing plans and 403(b) plans require an annual audit. CBM has a team dedicated to these types of highly specialized engagements.

Agreed Upon Procedures. Our team can perform a variety of specifically designed procedures and communicate our findings in a timely and straightforward manner.

Forecasts & Projections. We help our clients look ahead so that they can make better financial and operational decisions.

Taxation

When it comes to taxation, our approach is holistic. Our goal is to help you minimize your tax burden and maximize your after-tax wealth in all areas of your life.

Tax Planning. Our sophisticated, innovative tax planning services ensure that our clients are making smart financial decisions.

Compliance. We constantly review new tax legislation, regulations, cases and rulings to pinpoint opportunities for you.

Tax Return Preparation. We prepare tax returns for our clients in almost every state, and are constantly fine-tuning strategies for each client's circumstances.

Sound tax strategies and planning can help you grow your business. Are you a budding entrepreneur? Leading an established organization? We'll help you thrive.

Transaction Planning. How will a merger or acquisition, a real estate transaction or capital improvement affect your tax situation? We help with "what if" scenarios to inform your decisions.

Entity Formation. It's crucial to set up a new business correctly. We explain the pros and cons of each type of structure to save clients money and hassles down the line.

Wealth Management. We work closely with clients to preserve their wealth via proactive retirement, estate, gift and succession planning.

Trust & Estate Accounting. From the simplest trusts to the largest estates, we help you track and report specifics to the satisfaction of family and government.

IRS & State Audit Representation. Sometimes, clients may be asked to explain or defend their tax positions. Representing clients before tax authorities is a vital part of our business.

