

PROGRESS



Whether you're building a new business or managing an established family concern, we can help you make sound decisions.

CBM works primarily with privately held businesses, a majority of which are family owned. This focus has allowed us to concentrate solely on addressing the needs of these clients and the unique issues they face as they attempt to grow their businesses and build wealth for their families.

Every family has different goals, and that's where we start. We believe that your objectives should drive every decision, from how you structure your business to how you plan for succession. Because we have decades of experience working with multigenerational family businesses, we understand the financial and emotional issues you encounter as you navigate the pressures of leading a company and a family on one path.

We provide a broad range of services to family businesses. Among the most essential are:

Audits, Reviews & Compilations. We match our services to clients' requirements, offering different degrees of assurance services as needed. We also prepare financial statements, determine disclosures and consult on transaction measurement and reporting.

Tax Planning. Sophisticated tax planning is crucial to family businesses. Our holistic approach means we plan for the entire organization — the business,

Solid estate and succession planning will ensure that you leave a legacy for generations to come.

family members and other stakeholders — to ensure a unified, effective strategy.

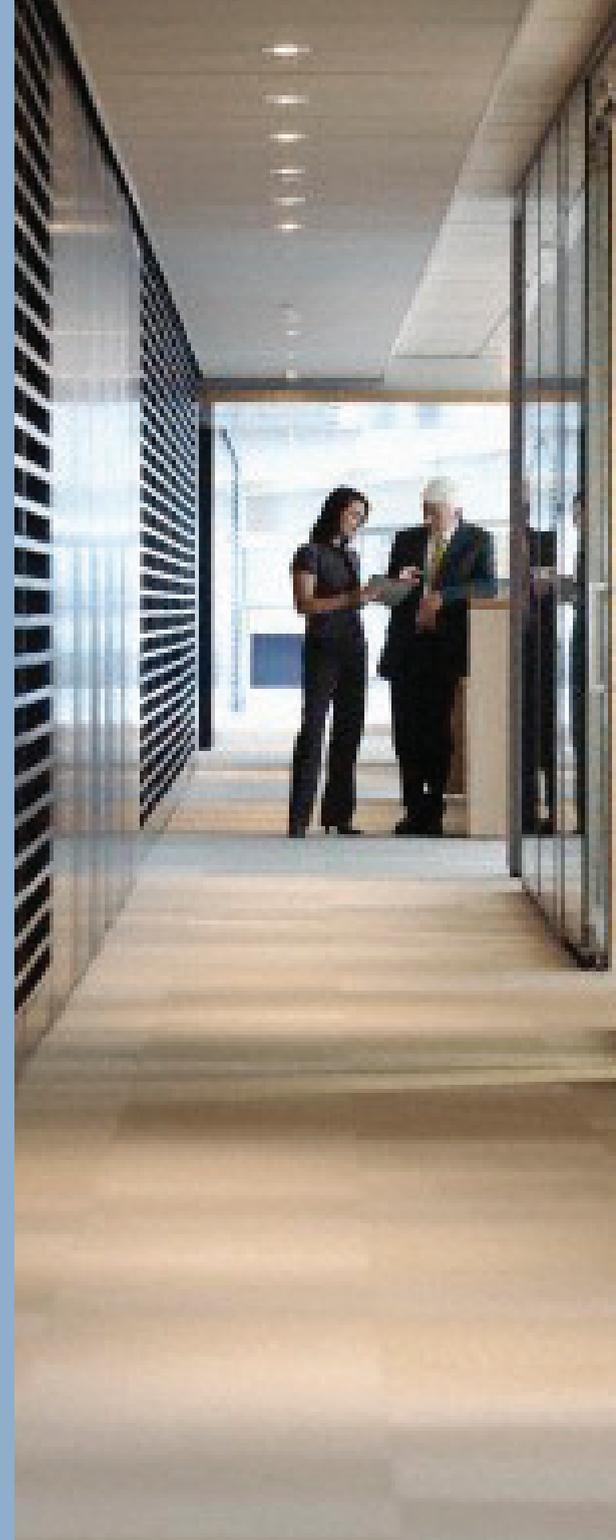
Gift & Estate Planning. Many techniques are available to preserve wealth for future generations. We can structure and execute a plan that addresses your long-term goals while strengthening your business.

Succession & Exit Planning. New leadership can make or break a company. CBM can help you decide how to move forward strategically — on your timetable — so that you make the most of your years of hard work.

Business Valuation. Our credentialed valuation analysts are highly trained and experienced. Our industry knowledge — particularly in our specialty fields of automotive dealerships, construction and real estate — means that we know the nuances that affect value.

Family Issues. We can help you address major family changes, including marriages, births, divorces, deaths and bankruptcy, with practical financial advice and sound business counsel.

CBM is committed to serving family-owned businesses and contributing to your family's future.



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 family-owned business 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
 - Buy-Sell Agreements
- Trust Accounting
- Financial Planning
- Benchmarking/Trend Analysis
- Agreed Upon Procedures
- Business Succession Planning
- Merger & Acquisition Support & Analysis
- Wealth Management
(Provided by CBM Financial Services, LLC)
- Investment Advisory & Insurance Services
(Provided by CBM Financial Services, LLC)



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