



---

## 2016 Service Menu

---

Your financial needs are evolving all the time. As your most trusted business advisor, we're evolving, too. Our 2016 Service Menu reflects several changes intended to help our clients, whether they are closely-held businesses, individuals, trusts, estates or not-for-profits.

---

### FOR BUSINESS

Keep your organization ahead of the curve.

#### Consulting

- Affordable Care Act Compliance
- Business Plans/Projections
- Business Succession Planning
- Due Diligence/Acquisitions
- Incorporation/Holding Company/Entity Formation
- Insurance Review (E&O, liability, umbrella)\*
- Group Benefit Plans\*
- Qualified Retirement Plans

- Professional Employer Organization (PEO) Selection
- Select Benefits(Key People/Owners)

#### Finance

- Audit/Review/Compilation
- Business Valuations
- Cash Flow/Cash Management
- Financing Assistance
- Forecasts/Projections

#### Tax

- Tax Planning
- Tax Preparation
- Representation
- Offers in Compromise

#### Technology

- QuickBooks™ Professional Advisor
- Peachtree Partners Accountcare™ Member

---

#### ADELMAN KATZ & MOND LLP

Your Most Trusted Business Advisor

230 West 41st Street, 15th Floor  
New York, NY 10036-7207  
212-382-0404  
fax: 212-382-2686  
[www.akmcpa.com](http://www.akmcpa.com)

---

#### Partners:

Alan R. Adelman, CPA  
Lawrence Katz, CPA, CFP®, PFS  
David E. Mond, CPA  
Jack E. Gold, CPA  
Stuart J. Hammer, MBA, CPA (retired)  
Warren M. Bergstein, CPA, AEP  
Craig L. Venokur, CPA

#### Principal:

Nancy L. Adams, MS, CPA

The AKM family of companies aims to be our clients' most trusted business advisor. To earn that trust, we work hard to improve on our own expertise, which has been honed over nearly half a century. And to cover all the bases, we build successful collaborations with other professionals – including attorneys, bankers, investment managers and insurance brokers. We invite you to find out more about the benefits of having us as your most trusted business advisor.

\* indicates services rendered by trusted outside partners and affiliates with AKM oversight.

### FOR INDIVIDUALS

Make your life run smoothly.

#### Finance

- Financial Record-Keeping
- Financial Statements
- Investment Planning/Portfolio Diagnostics\*
- Mortgages\*
- Education Funding\*
- Cash Flow Monitoring/Budgeting
- Appraisal/Valuation\*

#### Planning

- Comprehensive Financial Planning
- Estate Planning
- Matrimonial/Divorce Planning
- Specialty Planning for Same Gender Couples

#### Executive

- Bill Payment
- Business Management

- Family Office
- Insurance/Risk Review

#### Tax

- Tax Planning
- Tax Preparation
- FBAR/Related Filings
- Representation
- Offers in Compromise

### FOR ESTATES AND TRUSTS

Eliminate headaches with experienced assistance.

- Compliance Oversight (with attorneys)
- Estate Tax Returns
- Fiduciary Accountings
- Fiduciary Income Tax Returns
- Required Notices to Beneficiaries

### FOR NONPROFITS

Leave compliance to us.

- Federal and State Filings
- Donor Receipts
- Audits
- Financial Statements for Boards