Our Clients
LBA Haynes Strand serves privately held businesses, non-profit organizations, and individuals. Our clients include emerging companies, mid-size businesses, large entities, executives, and families with complex financial needs. They vary in size, industry, location, and age. One common thread our clients have is the need for a relationship with a firm that understands their business. They use us to discuss confidential issues and rely on us for accurate information, analysis of their results, and recurring planning sessions throughout the year.

Building Client Value
Our core function is to help build the value of your organization. For our business clients, we seek ways to increase profitability and accumulate wealth. Our non-profit clients rely on us to provide transparent operations and deliver the financial information they need to help fulfill their mission.

We take the time to understand your goals and customize a strategy unique to your objectives. Our firm acts as advisors that utilize accounting, tax, and financial reporting to help clients successfully manage their organization.

Your LBA Haynes Strand team will create and help execute a strategic blueprint to work toward achieving your goals. We provide a proactive and open exchange of ideas to manage your needs. Our team will identify and track key performance indicators that impact success, to both monitor progress and adjust efforts.
Comprehensive Lifecycle Management

Managing Your Business Lifecycle
The lifecycle is a series of stages that an organization transitions through during their lifetime. An early stage company concentrates on survival. A later stage organization is more concerned about stability and retaining the wealth accumulated from their success. LBA Haynes Strand identifies the stage every client is in and adapts our support to meet their current needs, while preparing them to enter the next lifecycle stage.

What Stage Are You In?
• **Emerging.** Start-ups with a primary concern of generating profits or fulfilling their mission.
• **Growth.** Companies that survived the emerging stage. They require more capital, systems, people and processes.
• **Maturity.** Businesses that are stable, comfortable, and typically growing a little slower. Owners who have accumulated wealth and are not ready to exit yet.
• **Transition.** Organizations that hit the point where they need to sell or transition to the next generation.

How Do You Move to the Next Stage?
Most companies gradually transition. At one point, most high growth companies slow their rapid growth, but still steadily build value. As organizations age, they may get comfortable with their success and consider methods to protect their wealth. Our team will help plan a strategy for each stage.

Engage an Entrepreneurial CPA Firm
Organizations often outgrow their current CPA firm but our firm is growing to meet the anticipated future needs of our clients. Their accountant may be a great person and friend, but if their focus is limited to filing tax returns and creating financial statements, they likely cannot provide the strategy to help your company grow or enter a different stage of the lifecycle. Not all firms can help solve problems or have the resources or experience to evaluate opportunities and resolve obstacles.

Let Us Construct a Plan with You
We can begin working with a company in whatever stage of the lifecycle they are in. Call us to begin a conversation.
Our Services

Relationships That Matter
Our professionals build strong foundations and lasting client relationships. We deliver value-driven engagements by working in collaboration to set goals, evaluate opportunities, and develop a strategy for your organization.

Tax Strategies
Our tax team will develop a tax plan specific to your organization and manage your filing requirements.

Organizations
• Customized tax plans
• Income tax returns
• Sales tax liabilities
• Multi-state tax issues
• Specialty tax credits
• Executive stock options
• Nexus studies
• Lease / buy analysis
• International tax support

Individuals
• Tax strategies
• Return preparation
• Family wealth strategies
• Retirement planning
• College funding
• Estates & trusts
• Gifting strategies
• Family office support
• Divorce support

Assurance & Reporting
The audit process is a vehicle for continuous improvement. We view each engagement as an opportunity to add value.

• Audits & reviews
• Agreed-upon procedures
• Management reports
• Benefit plan audits
• Internal audits
• Internal controls
• SOC 1 & 2 reporting
• Risk assessments

Accounting Leadership or Support
Strong financial reports are the result of well-designed accounting systems and thorough accounting processes. Our team can manage in-house staff, work with in-house leadership, outsource your accounting, and work in collaboration with your audit firm. We can become your accounting department. Our services include:

• Financial statements
• Bill payment
• Payroll management
• Accounts receivable
• Sales tax filings
• KPIs
• Intacct & QuickBooks
• Cash flow analysis
• Budgets & forecasts
• Cost accounting
• Fractional CFO role
• Fractional Controller role
Advisory Services

Our professionals have the diverse expertise and backgrounds necessary to help organizations grow. Whether our client needs assistance evaluating new opportunities or addressing challenges, we have the insight and depth to help.

In addition, we have vetted outside referral partners to assist as needed and our membership in the RSM US Alliance provides us with domestic and international reach. Some of our services include:

- Growth planning
- Goal setting
- Profit enhancement ideas
- M&A due diligence
- Exit strategies
- Succession planning
- Valuations
- Bank debt restructuring

Business Brokerage & Wealth Management

LBA Haynes Strand can help your business prepare a comprehensive exit strategy. We make recommendations to strengthen business value, conduct tax planning to optimize the post-tax impact sale of a business, find a buyer for your company with our Capital Advisors Group, and manage the proceeds of a sale through our wealth management affiliation.
Our Alliance Advantage

RSM US Alliance is a premier affiliation of independent accounting and consulting firms in the United States, with more than 75 members in over 38 states, the Cayman Islands and Puerto Rico. RSM US Alliance provides its members with access to resources of RSM US LLP, the leading provider of audit, tax and consulting services focused on the middle market, with more than 9,000 people in 86 offices nationwide.

RSM US Alliance member firms are separate and independent businesses and legal entities that are responsible for their own acts and omissions, and each are separate and independent from RSM US LLP. Members of RSM US Alliance have access to RSM International resources through RSM US LLP but are not member firms of RSM International.
Is Your Business Evolving?
Realigning organizational vision is a normal technique used by highly successful businesses. Change occurs in every company. It could be due to age of the leadership team, the economy, environment, or other conditions. The key is to see changes coming and be positioned to proactively react as needed.

Your current goals and obstacles may be in perfect alignment or may benefit from the fresh perspective of an outside set of eyes. Let us bring the expertise gained from interaction with our clients, who have provided us insight into their brilliant ideas throughout the years. Let us examine if some of our observations may provide ideas to help you revise or redirect your next steps.

Ready To Start The Conversation?
Taking time to articulate where you want to go is a powerful discussion. It helps you focus and reaffirm direction or realign your strategy.

Get started today with a complimentary, confidential consultation to assess the state of your business evolution.

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