

Service Businesses

In-depth knowledge & expertise in providing financial and business advice to:

Physician and dental practices; law firms; marketing, public relations and advertising agencies; technology companies; engineering and architectural firms; wealth management and investment advisors; startups and early stage entrepreneurs

That's what we bring to the table.

As a third generation, locally owned service business, we have a unique and in-depth understanding of the industry and what it takes to be successful. As a focused industry niche group, we spend each and every day researching and expanding our knowledge of the issues and challenges you face, spotting trends, listening to the visions and dreams of your peers, and advising people like you on the best moves to make to achieve growth and profitability, minimize risk and tax liability, engage the right people on your team, and position your business for long-term progress. We offer guidance through the complex web of tax, accounting, and financial data, so that you can focus your energy and passion on what you do best – driving your business forward.

*More than
the Numbers*

We offer a full range of services.

- ◇ *Strategic planning* (business plan development, benchmarking, compensation and benefits planning, budgeting and projections)
- ◇ *Business cycle consulting* (planning for growth and expansion, obtaining financing, structuring real estate and other transactions, mergers and acquisitions, succession planning, business valuation, buy-sell agreements)
- ◇ *Business improvement* (internal controls review, systems evaluation and implementation, liquidity and cash flow analysis, cost reduction and monitoring)
- ◇ *Tax planning and compliance* (tax minimization strategies, return preparation, IRS representation, estate and gift tax)
- ◇ *Assurance services* (audit, review, compilation, agreed upon procedures, employee benefit plan compliance, forensic accounting)
- ◇ *Outsourced accounting services* (monthly financial statement and/or payroll assistance)
- ◇ *General business advice* (entity review and selection, accounting methods, depreciation methods, inventory planning, cost segregation studies, corporate investments, owner disputes)
- ◇ *Board of Advisors*

Service Businesses Niche Team:



Jeff Calderon

Meredith Hughes

Steve Custer

Marilyn Owens

Rob Kester

Eric Shadowens

Renee Gehring



DMLO is an independent member of BKR International, a leading global association of independent accounting and business advisory firms, representing the expertise of more than 150 member firms with over 300 offices in over 70 countries around the world. BKR firms offer clients the best of both worlds: personalized local service and global expertise and connections.