

# Executive Overview



**RFB**  
*&*  
**CPAs**

# Taking You to the Next Level

## Experience Counts

RP&B is a mid-sized CPA and advisory firm that has been serving the Inland Empire area for over 25 years. We provide tax, audit, accounting and consulting services for a wide range of business clients.

We partner with our clients. The only way to effectively support a client is to help with more than just compliance reporting needs. The true value a CPA firm provides comes from the innovation and creative advisory insight they can offer as they get to know you and your business.

## Client Centered Communication (C<sup>3</sup>)

Our C<sup>3</sup> Process is our focus on getting to know you and your business. What do you want to accomplish in a set timeframe and how much risk do you want to take to help get there? We take the time to learn your needs and interests to determine what types of support you need, what profit refinement strategies will best serve you and how we can best manage taxes to your advantage.

## Goal Setting

Your RP&B team is not just driven by deadlines, but by plans we setup to help each client create and make progress toward their goals. We typically work with clients to set short-term objectives and long-term targets. We then meet with them regularly to measure success and modify activities as needed.

## All Under One Roof

Thought Leadership

Business Strategies

Audit & Tax Reporting

Financial Planning

ESOP Experts

Estate Planning



# Trusted Advisors That Make a Difference!

*“Make it Grow, Make it Liquid, Make it Last”*

## Core Support

RP&B is a full-service CPA and advisory firm. Our clients include emerging to large privately held companies, not-for-profit organizations and high net worth individuals. We ensure clients have a solid financial foundation to create accurate and timely reports. Our tax professionals help create and manage a tax plan to enable you to leverage tax incentives, credits or deferral opportunities.

## Profit & Advisory Focus

Our professionals become part of your leadership team and help clients gain a fresh, independent perspective. RP&B becomes your trusted advisor and will design a plan to help you move through different stages of your business lifecycle. We provide creative thinking, investigate unexpected events and monitor performance. We are always thinking proactively for our clients.



### Financial Reporting

- Audits, Reviews and Compilations
- Yellow Book and A-133 Audits
- Management Advisory Reports
- Employee Benefit Plan Audits (ERISA)
- Agreed Upon Procedures
- Internal Control Reviews



### Leadership Support

- Business Growth Strategies
- Goal Setting
- Benchmarking / PAR Scorecard
- Cash Flow Analysis
- Budget Preparation and Forecasting Systems
- Special Projects



### Tax Matters

- Benefit Plan Analysis
- Tax Planning
- Business and Personal Return Preparation
- Multi-State Tax Preparation
- Estate Plans and Trusts
- Family Gifting and Philanthropic Strategies
- Tax Authority Communications and Representation



### Transition Strategies

- ESOP Expertise
- Mergers and Acquisitions
- Succession Planning
- Planning Timelines
- Tax Strategies
- Post Transition Support



### Accounting Support

- Monthly Financial Reporting
- Property Taxes
- Fixed Asset Maintenance



### Executive Support & Planning

- Personal Tax Projections
- Advice on Stock Options
- Retirement Plan Strategies

## Gain a Fresh Perspective

If you are not performing to the level you think you should be, call to discuss your options. We can help you move to the next level.

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Make it Liquid,  
Make it Last”*