

# Exceeding Expectations



**KINGSBERY CPAs**

KINGSBERY • BARIS • VOGEL • NUTTALL

# From the Heart of Boulder



Founded in 1980, Kingsbery CPAs continues to serve Boulder county residents and businesses as their trusted advisor. We offer tax planning and preparation, business, trust and estate planning advice, accounting and a host of other financial and business-related services. We are the locally grown firm you can always trust to deliver expert and timely advice, outstanding service and we can deliver on your largest or smallest of needs. While we take this goal and our work very seriously, we have a lot of fun together as a company and we are committed to supporting the many institutions and non-profits that make this such a wonderful place to live and work.

**“Of all our professional partners, Kingsbery CPAs has provided by far the best value for our success.”** –Bill Skinner, President, Team Promark



**STUART KINGSBERY, CPA, J.D.,** is a shareholder who founded the firm in 1980. He received his undergraduate degree from Texas A&M with a summa cum laude designation and his law degree from the University of Colorado. Prior to 1980, Stuart worked with Ernst & Ernst in Houston. He is a licensed CPA and attorney in Colorado.



**ALEX BARIS, CPA/ABV/CFF, M.S.,** is a shareholder and has been with the firm since 1989. She previously worked for Deloitte Haskins & Sells. Alex received her undergraduate degree from UMass, her master's of accounting degree from CU, and her Accreditation in Business Valuations and Certification in Financial Forensics from the American Institute of CPAs.



**PAM EKREM VOGEL, CPA,** is a shareholder and has been with the firm since 1993. Upon receiving her undergraduate degree in business administration from CU with cum laude distinction, Pam worked as an auditor for Deloitte & Touche. In 1993, she returned to the firm as a staff accountant and earned her CPA designation in 1994.



**BRIAN NUTTALL, CPA, J.D.,** is a shareholder who has been with the firm since 1997. He is a licensed CPA and attorney in Colorado. He received his undergraduate degree in accounting and law degree from the University of Colorado as a member of The Order of the Coif.

## Services for a Diverse Client Base

Our clients have a wide array of financial and tax issues. As a result, we have gained valuable experience over the years in numerous specialized areas, many of which are listed below. We feel our ability to provide such a diversity of services reflects our versatility and competency, as well as our dedication to quality client service.

### Tax Planning and Preparation

Tax planning and preparation form a winning combination for our individual and business clients. We can handle all your tax needs whether you are an individual, partnership, trust, estate, corporation, or nonprofit. Our experienced staff can develop tax strategies that take advantage of new tax laws and legislation. Our preparation techniques have proven to be very successful when representing our clients before taxing authorities.

### Estate and Gift

Effective estate and gift planning facilitates the orderly transfer of assets to your beneficiaries, provides security for your surviving spouse, and can reduce or eliminate the tax due on the transfer of your business and other assets. For business owners, providing for business continuity and ownership succession is essential. We can guide you through the complex process of getting your financial affairs in order.

### Business Valuations

Business valuations are important for tax purposes when gifting certain assets or when an estate owns business interests. Our firm has performed many business valuations over the years for these purposes as well as for divorces and buying and selling businesses.

### Business Consulting

We take pride in the personal and business successes of our clients. We can help your business identify areas negatively affecting profitability and growth and develop solutions that are practically and technically strong. In addition to acting as a sounding board for management, we provide comprehensive, flexible strategies that address the issues affecting your business.

### Attorney Support

We have the tax and legal expertise to support attorneys in reviewing the financial and tax impact of legal documents including operating agreements, buy/sell, shareholder agreements, deferred compensation and equity plans.

### Nonprofit Consulting and Support

In addition to helping your nonprofit organization with its initial application for tax exemption, our experienced staff can help you stay compliant on all tax, accounting, donor communication and public support

rules and regulations.

We will help you determine the proper type of organization to set up, whether it be a public charity, private foundation, business league or charitable trust. We'll also work with you to create useful board reports or to navigate a dissolution or transition of the organization's assets. Our staff is highly involved in local nonprofits and appreciates firsthand the unique needs of these entities.

### Divorce Consulting

We have many years of experience consulting with clients and attorneys on divorce issues. In addition to valuing businesses in a divorce and performing asset tracing analysis, we can provide financial analysis of maintenance, child support, and property divisions.

### Business Entity Selection

Choosing the best entity for your business is a crucial decision that can have longstanding tax implications. We can assist you in evaluating the pros and cons of each entity type to help you determine the most advantageous form of business for your company.

### Expert Witness / Litigation Support / Forensic Accounting

Pending or existing litigation can result in the need for a qualified professional to present his/her opinion to support or oppose evidence submitted to the court. Our level of competence and experience allows us the opportunity to provide forensic accounting services and function as expert witnesses in such cases.

### International Taxation

Our experience with the taxation of U.S. residents working abroad, foreign citizens working in the U.S. and providing services to companies doing business in other countries has given us an extensive base of knowledge in the area of international taxation.

### Accounting Services

Providing financial information to our clients in a timely and accurate manner is a commitment that we feel cannot be compromised. Meaningful, well-organized financial records insure that your business operations will run more efficiently on a daily basis. Our firm provides a full range of accounting services including



compiled financial statement preparation, bookkeeping, payroll services and accounting system set-up. We can also forecast and evaluate your company's financial condition, estimate financing requirements, and track cash-flow sources and uses.

### Buying and Selling a Business

Structuring the purchase or sale of a business properly is a critical step in the process of buying or selling a business. Our competent staff has experience to guide you through the acquisition/disposition process by addressing such issues as cash flow analysis and tax considerations.

### Executive Advisory Services

Even the most qualified executives can benefit from competent, objective feedback. We can help your company's management team develop and evaluate compensation and benefit plans and specific strategies to facilitate the future growth and success of your business.

### Pension and Profit Sharing Plans

Qualified retirement plans (e.g., defined contribution or defined benefit plans, Keoghs, SEPs) can provide significant tax advantages for closely held businesses and self-employed individuals. We can assist you in evaluating the type of pension plan that will best serve the retirement needs of you and your employees.

Visit us at: [www.kingsberycpas.com](http://www.kingsberycpas.com)

## We Believe in Exceeding Client Expectations

With regard to personal service, expertise, and responsiveness, we view every client relationship as a partnership, and truly believe that our success is a result of your success. We continuously look for ways to raise our quality level of service to you and the community at large.



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A Professional Corporation  
Established 1980

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