

**Planning Ahead. Building Relationships. Securing Your Future.**



### OUR SOLUTIONS

At Hedman Partners, we provide our business and individual clients with high-quality, forward-thinking solutions that enable them to plan for a secure and sound financial future.

#### TAX SOLUTIONS

We provide our clients "peace of mind" regarding their federal and state income tax filings. Our focus is to minimize our client's overall tax liabilities as allowed by the tax laws. We accomplish this through advanced tax planning which may include:

- Choice of entity selections
- Estate planning
- State and Local Tax planning
- Enterprise Zone tax credits
- Cost segregation services
- R&D credit studies
- International Tax Planning

#### AUDIT SOLUTIONS

Although many times the need for audited, reviewed, or compiled financial statements is to satisfy the company's bank loan covenants, we also provide value to the owner through:

- Recommendations for improving internal controls
- Benchmarking and industry comparison of company results
- Potential opportunities for operational improvement
- Meeting with management and the board of directors to discuss the financial statements and related footnotes.

#### OTHER AUDIT AND CONSULTING SOLUTIONS

- 401(k) plan audits
- Real estate joint venture compliance (PAPA) audits
- Transaction due diligence
- Board of Directors consulting
- Business owner personal strategic planning
- Succession planning

### RALEIGH HEDMAN FINANCIAL SERVICES

When our clients need to minimize risk for their business or owners, we recommend they work with advisors from our affiliate, Raleigh Hedman Financial Services to select the appropriate coverage using the right companies at competitive rates. Also, if our clients need assistance making investment decisions while considering tax implications and other business factors, we refer them to our affiliate for assistance.

Raleigh Hedman Financial Services solutions include:

- Life insurance
- Medical insurance, group and individual
- Disability insurance, group and individual
- Long term care insurance
- Workers compensation
- Business liability insurance
- Business property insurance
- Umbrella insurance
- Qualified retirement plans
- Asset management
- Financial planning

### HEDMAN M&A ADVISORS

When our clients are considering merging, acquiring or selling their businesses, they work with advisors from Hedman M&A Advisors to define the goals of their exit or acquisition strategy, identify a value for the entity being sold, merged or purchased and then, when appropriate, secure competitive financing, too. Hedman M&A advisory services include:

- Investment banking, including both sale and purchase transactions
- Financing and loan brokering
- Business valuations

**WHY CHOOSE HEDMAN PARTNERS? HEAR WHAT OUR CLIENTS HAVE TO SAY.....**

"UVDI typically chose to engage the services of a big six accounting firm to perform our financial audits. With the proliferation of SOX requirements, we found these firms becoming less responsive, more costly and unable to meet our schedules. We decided to seek the services of a local accounting firm. After a thorough competitive evaluation process we selected Hedman Partners. We have found them to be comprehensive, diligent, cost competitive and responsive to our requirements."

Daniel Goetz  
President / CEO  
UltraViolet Devices, Inc.

"Hedman Partners has provided Paul Mitchell with exactly what we needed - when we needed it. Timely, professional & knowledgeable staffing and service is their hallmark. Undoubtedly we will continue to utilize them as we grow into our future."

Rick Battaglini, CPA  
CFO  
John Paul Mitchell Systems

"The invaluable knowledge of the Hedman Partners' team has helped B&B Manufacturing Co. achieve our financial goals in many ways. In particular, they have always provided us with appropriate and timely advice ensuring us that we fully minimize our tax liabilities to the extent allowed by the law. Because of our confidence in the Hedman Partners' team, we also looked to them for our own estate planning needs as well. As a result, we now have a plan in place that will not only benefit our company, but also our family for generations to come. We value the expertise of the Hedman team and more importantly the relationships we've developed!"

Ken and Sharon Gentry  
President & Owner  
B&B Manufacturing Co.

"The Hedman Partners' team understands our personal priorities and provides practical advice that considers our perspective. They have encouraged us when appropriate and cautioned us when necessary. We look at them as not only our accounting firm, but as true partners helping us navigate the challenges that a growing business presents. We have brought them into real estate decisions as well as expansion plans, banking choices, estate planning, and charitable giving. We truly value Hedman Partners as a tremendous asset to our business!"

Ron Regenstreif  
President/CEO  
Regency Lighting

