



Closely-Held Companies

Goal Setting & Profit Enhancement

Cowan Bolduc Doherty (CBD) provides comprehensive support to help businesses set and achieve goals. We work with you to assist in identifying your critical success factors and then develop the key performance indicators to help you monitor progress. Our role is to provide the reporting and advice needed to help you meet your lifestyle objectives. We are advisors first and accountants second.

Profit Focused

Our staff understands the reason you are in business is to create profits and develop the lifestyle you wish to live. We work with you to streamline reporting, maximize tax benefits and contribute ideas to enhance your profitability. CBD professionals think outside the box and are highly versed with continual training on any new tax updates, credits and benefits. We help you understand what you need to be successful and implement that strategy.

Advisory Relationships

CBD becomes your trusted advisors. We invest the time and energy to understand your needs and regularly communicate with you. Our team has experience helping a wide array of privately held companies and can bring a fresh infusion of new ideas to your company. We deliver insight and act as a sounding board for our clients.

Create a Tax Plan

Our tax plan is the cornerstone to working with you. It creates a process for frequent communications which helps us stay connected to your business.

Our Services Include:

- Tax Return Preparation & Filing
- Audit, Review & Compilation Services
- Client Accounting Solutions
- Cash Flow Planning & Financing
- Management Consulting
- Retirement Planning
- Exit Strategies & Family Succession

Managing the Moving Parts

Every business and their owners have a diverse number of accounting and tax needs to address such as dealing with financial reporting, multiple entities (Corporations, LLC's and Trusts), integration of federal and state income tax compliance and planning, and succession planning inside and outside of the business. CBD helps you integrate these complexities with the non-financial and non-tax considerations, and assists you with managing these moving parts.



ADVISORS.
ACCOUNTANTS.