



Family Owned

Keeping You on Track

Cowan Bolduc Doherty (CBD) helps family operated businesses create and maintain legacies. We bring a fresh perspective and ideas into your company. Our main goal is to help you maintain and enhance profitability and make sure that family members in leadership positions have the tools and reporting they need to best serve the company. We become your trusted advisors and an integral part of your team.

Understanding the Dynamic

Our team understands the unique, sometimes challenging environment that comes along with family members and work. We strive to make sure there are plans in place for family members in each phase of the business from entry level through retirement. CBD can help you understand how to get from where you are now, to where you want to be in the future, as well as collaboratively work with you to develop the steps needed to get there.

Advisory Relationships

CBD becomes your trusted advisors. We invest the time and energy to understand the needs of your business and regularly communicate with you. Our team has experience helping a wide array of family businesses from generation to generation. We help you manage the moving parts of a project. CBD acts as the quarterback and takes "slices" of a project or goal and then coordinates the entire effort.

Our Services Include:

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

Keeping You Focused on What You Do Best

Every business has a diverse number of accounting and tax needs to address such as dealing with financial reporting, succession planning, planning for family members not in the business, multiple entities and integration of federal and state income tax compliance and planning. CBD helps you navigate these complexities so you and your family can stay focused on what you do best.

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.



ADVISORS.
ACCOUNTANTS.