

Managing the Moving Parts

Coordinating the Complex Needs

Time is such a rare commodity. It manages to slip away with the daily distractions from so many directions and can keep us from taking the steps needed to get us closer to where we want to be. Our approach to managing the moving parts enables our clients to stay focused on what they do best, yet still make progress toward those projects and objectives that they never have time for.

What are 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.

How Does the Process Work?

This ties into our communications process. By staying connected with our clients, we are able to become an integral part of their operations. We understand their business and become the sounding board for them to discuss ideas and obstacles. Ultimately, we quarterback the process to help our clients make progress.

Managing the Moving Parts:

- Determine what is the objective
- Evaluate and understand your scope
- Identify all of the pieces we need to monitor
- Prioritize the most important work
- Assign and delegate tasks to be accomplished
- Set timelines and expected deliverables
- Manage the process

Gap Management

We understand that sometimes the gap between where you are today and where you want to be seems massive. The list can be long and some of the items on the list can be extensive. CBD is well-versed in taking a project and breaking it down into manageable parts. We are advisors first and accountants second. Call us to discuss your big picture.

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.