



## Accounting, Auditing, Tax and Advisory Services for **Family Owned Businesses**

### Family Business Practice Group: An Overview

Running a business that you own has its own particular set of challenges and demands. Yet at the end of the day, most owners can return home for a little respite – and a chance to restore that important balance between work and family life.

Family-owned businesses, however, are different. The dynamics that drive them are unique. From long-held patterns governing communication, conflict and resolution, to varying attitudes about fairness, respect, boundaries and entitlement, a family-owned business often has the most to gain from experienced professionals with an outsider's perspective.

Family business owners turn to RBB for the objective, sensitive advice they need to overcome family-specific business challenges. Our experience over a broad range of industries in business strategy, financial systems, accounting and audit, taxation, valuation, M&A and succession planning provide the right breadth of service to meet their needs – both for today and for the future.

Some of the specific ways we've helped our family-owned business clients include:

- Corporate income tax, pension and benefit planning
- Developing tax strategies with owners' attorneys, financial advisors
- Conducting valuations of assets for family succession plans
- Succession and estate planning to maintain business continuity
- Identifying optimal tax benefit scenarios for charitable donations
- Advising on ESOP and other employee compensation strategies
- Providing crisis management, conflict resolution advice as needed

But that's only a part of the story. For a more specific description of these and other accomplishments on behalf of our clients, please call:

**Bill Rucci, CPA, MST or Paul Bardaro, CPA, ABV at 781.321.6065.**

### The Right Size Accounting Firm

RBB is uniquely suited to handle assignments for family owned businesses. Our size and structure allow us the flexibility to deliver superior service from a team headed by a partner of the firm, and yet remain within your established budget parameters for either a specific project or an ongoing engagement.



### Client Value Points

**Responsive and Involved Partners**

**Seasoned Accountants with Big 4 Experience**

**More Cost Efficient than Larger Firms**

**Serving Business Clients Since 1987**

**Part of an International Network of Firms**



**RUCCI, BARDARO & BARRETT PC**  
Certified Public Accountants and Business Advisors  
**THE RIGHT SIZE ACCOUNTING FIRM**

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