



## Family-Owned Businesses Accounting, Auditing, Tax and Advisory Services

### 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 are different. The dynamics that drive them are unique. From longheld 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 RBF for the objective, sensitive advice they need to overcome family-specific business challenges. Our experience in business strategy, financial systems, accounting and audit, taxation, valuation, M&A and succession planning – over a broad range of industries – provides the right breadth of service to meet their needs, both today and for the future.

### Some specific ways we help our family-owned business clients:

- 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 part of the story.

For a more specific description of these and other accomplishments on behalf of our family business clients, please contact Bill Rucci, CPA, MST, CGMA at (781) 321-6065, ext. 116 (email: [billr@rbfpc.com](mailto:billr@rbfpc.com)) or Paul Bardaro, CPA/ABV, CGMA at ext. 122 (email: [paulb@rbfpc.com](mailto:paulb@rbfpc.com))

### RBF Client Benefits:

- **Proactive, involved partners**
- **Seasoned accountants with Big 4 experience**
- **More cost efficient than larger firms**
- **Serving businesses since 1985**
- **Member of an International Network of firms**



For high-level executives looking to confirm their gut instincts about where their business stands – and where it's going – RBF provides the timely financial data and deep, strategic insights they need to move ahead with confidence.

## SUCCESS, MEASURED.