



AUDIT · TAX · ADVISORY

Today's environment challenges your business at every turn and finance and accounting challenges are no exception. Finding the right audit, tax and advisory partner for your business needs can help to ensure that your business manages the risks, regulatory environment and opportunities that you face.

Our Firm

Holtzman Partners is a full service accounting firm focused on business audit, tax and advisory services. Our partners offer deep expertise and promise high quality and personal service at reasonable fees. Founded in 2004, Holtzman Partners has served many industry leaders including HomeAway, Thermon, Green Mountain Energy, Bazaarvoice, Austin Regional Clinic, SolarWinds, Stratus Properties, and Symantec.

Our Services

Our firm provides a host of business audit, tax and advisory services that are all backed by experienced professionals who are subject matter experts with extensive industry experience. We align our team directly with client needs for the most efficient and high value service. In addition, we have invested in automated audit, tax and accounting software, research, and tools that help to keep us abreast of emerging accounting changes and help streamline our service offerings. **Overall, we believe that this approach allows our firm to provide the quality of service expected from a large international firm, at lower costs.**

Industries Served

Our team has experience with multiple industries including: Construction, Energy, Government Risk Pools, Healthcare, Manufacturing, Not for Profit, Natural Resources, Professional Services, Real Estate, Retail, Technology, Telecom, and Venture Capital & Private Equity.

Audit Services

Holtzman Partners provides audit and assurance services for companies in a wide array of industries.

FINANCIAL STATEMENTS

Holtzman Partners performs independent financial statement audits in accordance with professional standards established by the American Institute of Certified Public Accountants (AICPA).

EMPLOYEE BENEFIT PLANS

Employee benefit plan audits are an important part of our practice, and we devote a substantial amount of resources to this area. Our firm is a member of the AICPA Employee Benefit Plan Audit Quality Center and has a dedicated team devoted to employee benefit plan audits. Our staffing model relies on hiring experienced staff with large international accounting firm experience which enables us to more efficiently serve our clients' needs. This experience includes auditing: Master Trusts, Defined Contribution Plans, Health and Welfare Plans, 403(b) Plans, and 401(k) Plans.

SSAE 16 PREPARATION & AUDIT (FORMERLY SAS 70)

Our firm is uniquely positioned to provide SSAE 16 preparation and audit services to companies in a variety of industries. The experience of our personnel allows us to provide a quality of service and reporting that is at least consistent with the larger international firms. This quality is ensured by the direct involvement of our partners in each engagement and a comparison of a client's internal controls against a database of controls maintained by our firm.

AUDIT SERVICES

- Financial Statements
- Employee Benefit Plans
- SSAE 16 Preparation & Audit (formerly SAS 70)

TAX SERVICES

- Income Tax Compliance
- Tax Consulting
- Income Tax Accounting
- Tax Controversy and Resolution Assistance

ADVISORY SERVICES

- SOX & Regulatory Compliance
- Internal Audit & Control
- IT Risk Evaluation & Consulting
- HIPAA Audit Preparation
- FFIEC Audit Preparation
- Technical Accounting Consulting
- SEC Filing Preparation Assistance
- M&A Due Diligence
- Early Stage Advisory

Tax Services

Holtzman Partners provides an array of tax services for clients varying in industry and size. With depth of experience in federal, state, and international taxation issues, we assist clients in developing an effective and efficient tax strategy.

INCOME TAX COMPLIANCE

Compliance and reporting can consume significant resources from your finance department and are often not an effective use of your resources. We can assist with preparing your federal, state, and international income and franchise tax returns.

TAX CONSULTING

Considering the vastness, complexity, and ever-changing tax laws, many companies seek highly experienced tax professionals to assist with their tax needs. Our specialists provide tax consulting services in a wide range of areas, including federal, state, and international income tax and local sales & use tax. Our tax team focuses on quality service to help you build a solid sustainable foundation that meets your objectives.

INCOME TAX ACCOUNTING

Today's ever-changing tax environment is increasingly complex so complying with income tax accounting standards under U.S. GAAP has become increasingly difficult. We offer tax accounting services to assist with your company's income tax provision needs. Our practice area is designed to help you with all facets of tax accounting, such as supporting quarterly and annual income tax provision calculations, validating tax balance sheet accounts, and implementing new accounting standards.

TAX CONTROVERSY AND RESOLUTION ASSISTANCE

New IRS examination approaches are increasing the potential for tax disputes. As the IRS broadens the range and types of returns under review, it is important to have a deeply experienced tax team on your side. Holtzman Partners' Tax Controversy and Resolution Assistance services are built to support companies through the entire process, which includes planning ahead to minimize the risk of disputes, preparation and filing of amended returns, and corresponding with the IRS to efficiently resolve disputes.

Advisory Services

Holtzman Partners provides business advisory services for clients in various industries and at different stages of growth. The overall focus of these services is to help improve a client's business processes and internal controls while considering risk, regulatory considerations, and short term and longer term needs for technical, compliance, or regulatory assistance. Specifically, our advisory services include:

SOX & REGULATORY COMPLIANCE

Our firm offers relevant experience and expertise to help companies manage ever changing operational and regulatory risks and adapt to increasingly complex regulatory and control environments. We have found that this experience is vital to effectively assist our clients evaluate compliance with the requirements of the Sarbanes-Oxley Act (SOX). Our SOX services are tailored to each client's needs and vary from full outsourcing of the entire SOX effort to providing consulting services to management.

INTERNAL AUDIT & CONTROL

Our clients have the opportunity to outsource their internal audit function to our firm or utilize the extensive experience of our personnel for individual internal control related projects. These services help reduce the risk associated with the internal audit function, provide our clients with deep expertise in internal control matters and allow clients to benchmark their internal control structure against other companies.

IT RISK EVALUATION & CONSULTING

Our firm maintains a talented group of IT professionals with a combination of technical and audit experience

DEEP EXPERTISE IN THE FOLLOWING INDUSTRIES

Construction
Energy
Government Risk Pools
Healthcare
Manufacturing
Natural Resources
Not for Profit
Professional Services
Real Estate
Retail
Technology
Telecom
Venture Capital & Private Equity

which rivals that of large international accounting and consulting firms. The underlying purpose of most of our IT services has been to evaluate risks and identify efficiencies in a company's business processes through the better utilization and control of its IT systems. Our IT services include reviewing the various components of the IT environment which have traditionally included system security, user access reviews, new system implementation, and change management evaluations.

HIPAA AUDIT PREPARATION

Our HIPAA compliance services allow companies to voluntarily evaluate the impact of HIPAA requirements before a formal evaluation is required by a regulatory agency. This service allows management to be confident that their control structure is sufficient to address HIPAA requirements thus reducing the exposures that may result from non-compliance with its rules.

FFIEC AUDIT PREPARATION

Our services help your company comply with FFIEC requirements including assistance with the creation of internal control policies, developing and performing an internal risk assessment and evaluating internal controls on behalf of management. These procedures are intended to help ensure that the company will meet FFIEC requirements if an audit were to be performed by a regulatory agency, thus reducing the exposures that may result from non-compliance with the guidelines.

TECHNICAL ACCOUNTING CONSULTING

We provide technical accounting consulting and assistance to companies in need of deep experience on specific projects. Accounting rules can be difficult to interpret even for seasoned veterans. We provide our clients with the resources and project management skills to bring an issue to closure. If you need specific resources, we can also augment or backfill staff for a period of time to assist with your technical accounting needs.

SEC FILING PREPARATION ASSISTANCE

Our partner group has been directly involved in the initial public offerings of some of Austin's most successful companies. Our team is experienced at dealing with the complexities of SEC reporting to help you navigate the process of both 1933 Act and 1934 Act Filings. Our firm is able to draw upon this experience to help emerging companies with the many challenges that face today's public filer. This experience also allows us to provide resources with expertise in financial reporting to help augment the finance function for your organization.

M&A DUE DILIGENCE

The experience of our personnel in a variety of industries at both domestic and international companies provides a strong basis for providing our M&A Due Diligence services. These services can include project management assistance, issues consultation or staff augmentation. No matter which service is utilized, our clients are assured that the full experience of the entire firm is available to address issues that invariably occur throughout an M&A project.

EARLY STAGE ADVISORY

At Holtzman Partners, we are dedicated to providing start up and early stage advisory services to our clients. We have experience with over 200 venture-backed start-up and high growth companies and our team has unparalleled experience in serving the needs of entrepreneurs. We know your needs as our firm was started with the same entrepreneurial spirit; to forge our own path.

CONTACTING HOLTZMAN PARTNERS

Feel free to directly contact any of our partners to evaluate your needs or visit our web site at:
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