2010 Service Menu

We're about more than just accounting and tax services. Our family of companies – Adelman Katz & Mond LLP, AKM Family Office Services LLC, AKM Consulting Group LLC (a Registered Investment Advisor) and AKM Risk Management Services LLC – has just one goal: to be your most trusted business advisor. Whether you just need our opinion, want us to roll up our sleeves and work alongside you, or choose to have us take matters off your hands altogether, we offer a full range of financial, business and life management solutions.

Adelman Katz & Mond llp
Your Most Trusted Business Advisor

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The AKM family of companies aims to be our clients' most trusted business advisor. To earn that trust, we work hard to improve on our own expertise, which has been honed over 40 years. And to cover all the bases, we build successful collaborations with other professionals – including attorneys, bankers, investment managers and insurance brokers. We invite you to find out more about the benefits of having us as your most trusted business advisor.

* indicates services rendered by trusted outside partners and affiliates with AKM oversight.

BUSINESS CONSULTING

- Business Plans and Projections
- Business Succession Planning
- Due Diligence and Acquisitions
- Incorporation and Business Formation
- Insurance Review (E&O, liability, umbrella)*
- Group Benefit Plans (health, dental, disability and more)*
- Qualified Retirement Plans (401(k), profit sharing and more)
- Select Benefits for Key People and Owners

BUSINESS FINANCE

- Audit, Review and Compilation
- Business Valuations
- Cash Flow/Cash Management
- Financing Assistance (bank, factor, lease and alternative)
- Forecasts and Projections
- Commercial Mortgage Selection

DIVORCE CONSULTING

- Matrimonial Financial Planning
- Property Valuation*

ELDERCARE CONSULTING

- Elder and Long-Term Care Planning
- Family Financial Analysis
- Health Coverage Consulting

ESTATE AND TRUST

- Compliance Oversight (with attorneys)
- Estate Tax Returns
- Fiduciary Accountings
- Fiduciary Income Tax Returns
- Required Notices to Beneficiaries

EXECUTIVE AND FAMILY OFFICE

- Personal Payables Manager
- Business Management (for entertainers, sports professionals and others)
- Family Financial Services
- Asset Protection Planning
- Personal Concierge Services

INTERNATIONAL CONSULTING*

- Executive and Family Office Services
- Tax Services
- Risk Planning

more…

PERSONAL FINANCE

- Portfolio Review*
- Comprehensive Financial Planning
- Financial Record-Keeping
- Financial Statements
- Investment Planning and Portfolio Diagnostic*
- Retirement and Pension Planning
- Estate, Trust and Gift Planning
- Mortgages*
- Education Funding*
- Cash Flow Monitoring and Budgeting
- Appraisal and Valuation Services*
- Virtual Vault Document Storage and Management*

RISK PLANNING AND MITIGATION

- Risk Assessment
- Individual Insurance Review (life, medical, disability, long-term care, property and casualty)*
- Insurance Planning and Selection*

TAX SERVICES

- Tax Planning (including charitable donation and tax reduction strategies)
- Tax Preparation
- Representation at Tax Examinations
- Offers in Compromise
- Trust and Estate Preparation

TECHNOLOGY SERVICES

- Systems Design, Implementation and Customization
- Financial Technology Consulting for Businesses and Individuals
- QuickBooks™ Professional Advisor
- Peachtree Partners Accountcare™ Member

Strategic Alliance Partners

Rosenthal Zaretsky Niman & Co., LLP
Chartered Accountants

Ralf Otto, Steuerberater

Beechams, LLP, Chartered Accountants

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