

Family and Closely Held Business Practice

Levine, Caufield, Martin & Goldberg, P.C. serves family and closely held businesses with a personal touch. We recognize that most organizations need business consulting services as well as the traditional accounting, auditing and tax services that CPA firms provide. Our specialized services include short-and long-range planning, budgeting and systems review.

Family and closely held businesses face a host of challenges in today's economic environment, and our partners are well positioned to serve as members of your advisory group. We often collaborate with attorneys, benefits and financial advisors and will help facilitate strategic discussions among this circle of trusted advisors on your behalf, as well as for your family and your business.

We work with family and closely held businesses of all sizes including start-up and long-established businesses. We will advise you in establishing best accounting practices within your industry. When the time comes for ownership transition we will work with you and the new investors and assist you with the required documentation in response to their auditors due diligence requests.

As family businesses grow and your needs change, our services expand to include loan and lease negotiations as well as ensuring compliance with bank covenants. Our client base includes multi-generational enterprises where we are able to offer advice on tax, estate and succession planning issues that arise for transfers from current to potential new owners.

At LCMG, we take a long-term perspective on our clients' needs and measure our working relationship in terms of decades, rather than in years.

“A father asked for our assistance and advice in the transfer of his business to his son. We coached the son on best business practices and helped to integrate this second generation with customers and vendors. Our long-standing experience with the dynamics of this type of generational shift enabled us to ensure a smooth transition in ownership for the company without loss of customers or employees and, because of proper planning, beneficial tax consequences.”

LCMG
Certified Public Accountants

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