



The Right Engine for Innovation

Grow Your Business with the Right Start-up Solution

As a leader of an innovative company, you face unique challenges in the early stages of growing your business. You may ask yourself:

- ▶ Which entity structure is best for my stage of growth?
- ▶ Is my organization operating in accordance with local, state and federal tax rules and regulations?
- ▶ How do I attract investors?
- ▶ Are my financials ready to be presented to investors?

Cherry Bekaert has a dedicated team who can provide quality solutions to position your company for growth.

Lifecycle Stage Services for Innovative Companies

Early Stage	Start-up Stage	Expansion Stage	Later Stage
<p>Services include...</p> <ul style="list-style-type: none"> ▶ Corporate Structuring 	<p>Early Stage services plus...</p> <ul style="list-style-type: none"> ▶ Tax Credits ▶ R&D Studies ▶ Compensation & Benefits 	<p>Start-Up Stage services plus...</p> <ul style="list-style-type: none"> ▶ External Audit/Review ▶ International Tax ▶ IT Audit ▶ SSAE 16 ▶ Sales & Use Tax ▶ Valuation ▶ Property Tax ▶ Transfer Pricing 	<p>Expansion Stage services plus...</p> <ul style="list-style-type: none"> ▶ 10Q and 10K ▶ IPO ▶ External Audit ▶ Internal Audit ▶ SOX Compliance and Readiness ▶ Transaction Advisory

Early Stage Package

- ▶ Preparation of U.S. income tax return
- ▶ Preparation of one state income tax return
- ▶ Preparation of 1-5 Schedule K-1s
- ▶ One consultation meeting to discuss tax planning strategies or general accounting matters
- ▶ Consulting discount of 50% off standard rates for other services

Start-Up Stage Package

- ▶ Preparation of U.S. income tax return
- ▶ Preparation of one state income tax return
- ▶ Preparation of 6-10 Schedule K-1s
- ▶ State and local credit review (does not include implementation)
- ▶ R&D credit benefit review (does not include report and documentation)
- ▶ One consultation meeting to discuss tax planning strategies or general accounting matters
- ▶ Consulting discount of 50% off standard rates for other services

Expansion Stage Package

- ▶ Preparation of U.S. income tax return
- ▶ Preparation of one state income tax return
- ▶ State and local compliance and opportunity review (does not include implementation)
- ▶ International tax planning review
- ▶ Consulting discount of 30% off standard rates for other services

Let us be your guide forward



Michael Valerio, CPA, MBA
Partner
mvalerio@cbh.com

Atlanta | Austin | Charlotte | Greenville | Hampton Roads | Miami | Nashville | Raleigh-Durham | Richmond | Tampa | Washington, D.C.