

# GOING FORWARD

From our beginning, we have focused on assisting clients in meeting their financial goals. We are motivated, indeed driven, by the potential of improving their wealth and well being. We take great pride in knowing that we have made a meaningful, tangible contribution to our clients, their families, and their businesses.

## SERVICES OVERVIEW

### Business Tax and Financial Assurance Services

- Income Tax Planning and Research
- Tax Return Preparation
- Financial Projections and Forecasts
- Financial Statement Preparation
- Financial Statement Audits, Reviews, and Compilations
- Internal Control Reviews

### Personal Tax and Advisory Services

- Income Tax Planning and Research
- Tax Return Preparation
- Estate Planning
- Fiduciary and Trust
- Eldercare

### Business Consulting Services

- Mergers and Acquisitions
- Succession Planning
- Employee Benefit Plans
- Employee Stock Ownership Plans
- Business Valuations
- Cost Segregation Studies
- Financing Assistance
- Bookkeeping
- Litigation Support
- Peer Review

### Strategic Wealth Services

- Financial Planning
- Retirement Planning
- Investment Manager Selection
- Investment Management Oversight
- Insurance Consultation
- Management Fee and Compensation Analysis

Davie Kaplan is an independent member of an international organization. Our clients benefit from our ability to rely on a global network of highly respected firms that provide a personal touch.

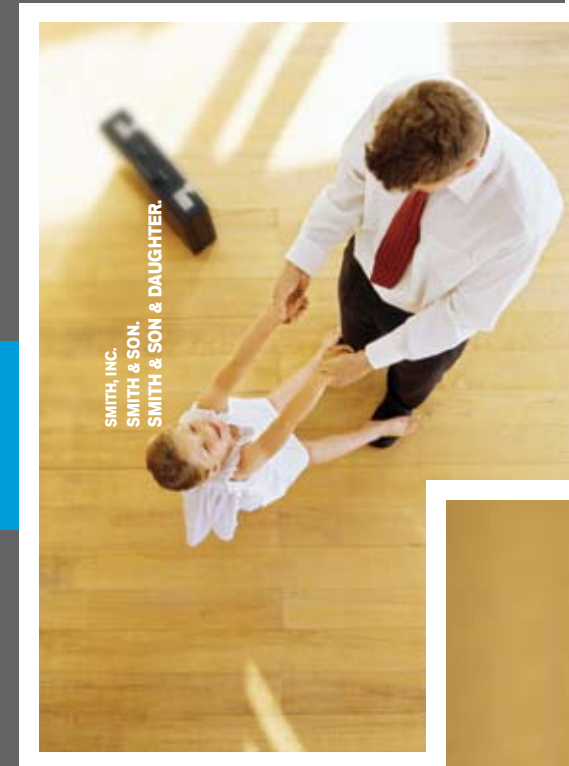
Securities offered through 1st Global Capital Corporation, Member NASD, SIPC, Investment Advisory Services including fee-based asset management accounts held through NFS, LLC are offered through 1st Global Advisors, Inc. All other financial planning services are offered through DKCB Wealth Care Advisors, LLC. DKCB Wealth Care Advisors, LLC and 1st Global Capital Corp. are unaffiliated entities.



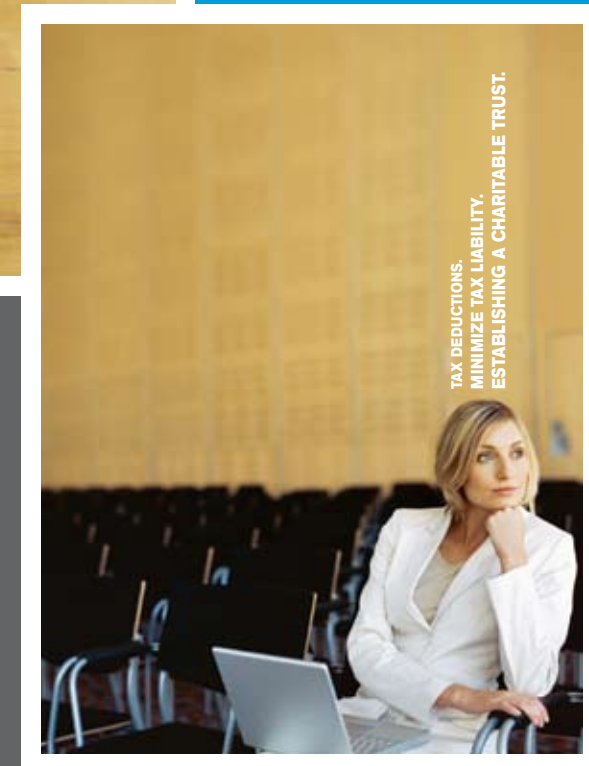
SHAPING YOUR FINANCIAL DESTINY

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DISCOVER DAVIE KAPLAN



SHAPING YOUR FINANCIAL DESTINY



CASH FLOW.  
BANKING REQUIREMENTS.  
MAXIMIZE RETIREMENT SAVINGS.

# SHAPING YOUR FINANCIAL DESTINY

**We are passionate**

about understanding the complexities of our clients' needs, which are critical to providing comprehensive and timely solutions.

Davie Kaplan is committed to a high degree of quality and timely service. We begin with a renowned precision in our audit, accounting, and tax services. This allows us to focus on meeting your most specific business and personal financial needs.

Of course, all that we do depends on a diverse group of bright, caring people who are motivated by our mission. We look for ways, beyond the expected, to advance our clients' journey toward financial fulfillment. Destiny requires nothing less.

**Since 1972, Davie Kaplan**

has chosen to serve the needs of closely-held businesses and individuals. This focus allows us to have greater command of the issues that confront sole proprietorships, partnerships, and corporations owned by families or their employees.

In order to provide our clients with extraordinary tax and financial solutions, we have developed an expertise in several industries; including Manufacturing, Distribution Real Estate, Construction, and Medical Practices.

**Everyone has a destiny.**

As individual, perhaps, as our fingerprint. Every path to reach it, is by definition, one-of-a-kind. This means you will need a partner who understands your business and is very, very good at theirs.

**Those who own closely-held businesses do not just find ways to succeed, they often invent them.** You take risks, follow your instincts, and depend on only those who have earned your trust.

One way we build mutual confidence is by being proactive on your behalf. We empower our people to be your advocates. We arrange teams by matching our professional and industry-specific expertise with your needs. This approach ensures that we combine the right disciplines to be thorough and efficient.

PEOPLE  
PEOPLE  
PEOPLE

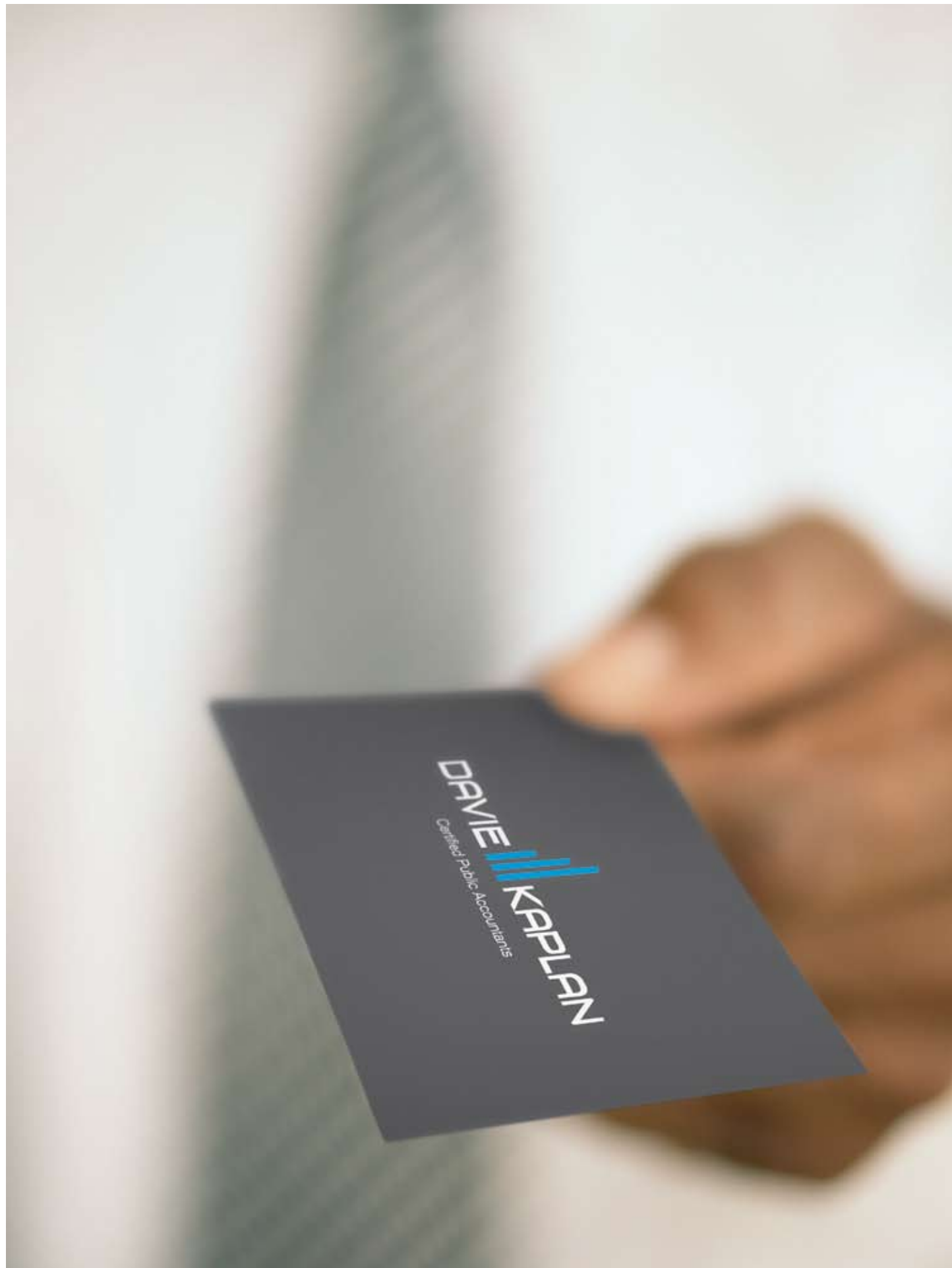
# REMARKABLE

Our approach also puts us in a position to show you opportunities others might miss. We point out potential obstacles before they become mountains to climb. This makes us better able to develop more effective strategies for every stage of your company's development—from startup to succession.

We are now serving some companies' third generation of owners. On average, our client relationships exceed fifteen years.

Clients tell us that our people exhibit characteristics they admire: enthusiasm, perseverance, and above all, responsiveness. They tell us we have become their most trusted business advisors.

This is our proudest achievement; a result of having some very remarkable people at Davie Kaplan.



# OUR PROMISE

**We offer a wide range of services** that go beyond accounting and tax. For instance, we provide guidance on the structure of new business entities, design executive compensation plans, and assist with due diligence in connection with mergers and acquisitions.

**Individual wishes will vary.** Your idea of wealth and its purpose is unique to you. So how could we possibly know what's right for you?

We will ask. That is how the relationship begins. We will also remember. Few of our clients found success overnight. After thirty-five years, we know there is more to destiny than promise. We also know it awaits us all—and is kindest to those who are prepared to grasp it.

**We will help you shape your financial future.**

We will build a relationship based on clear and honest communication; a partnership that will allow you to take a deep breath. Be assured that whatever aspects of your business you entrust to our care, from an effective tax strategy to a growing array of business and personal services, we will have your ultimate wealth and well-being in mind.

We guide our clients' estate planning efforts. We offer advice on how to make your hard-earned savings provide for a long and meaningful retirement. We show you how this process can enrich the lives of generations to come.