

Business Services

DELIVERING BUSINESS SERVICES THAT INNOVATE AND INSPIRE

At Creative Planning, we understand that your business reflects your passion. To support you, you need a partner to simplify the complexities you face and help you make more confident decisions about the future of your business. Our business services offering provides customized, high-quality expertise to support every phase of your business journey.



AUDIT & ATTEST

- ◇ Audit and Assurance*
- ◇ Accounting Services*
- ◇ Fraud and Forensic Accounting*



TECHNOLOGY

- ◇ ERP Implementation and Support
- ◇ Cybersecurity Assessment
- ◇ Data Backup and Disaster Recovery
- ◇ Cloud Services
- ◇ Managed IT
- ◇ VOIP Solutions
- ◇ Custom Software and Integration Development



BUSINESS TAX

- ◇ Outsourced Tax and Accounting Services
- ◇ State and Local Tax Services
- ◇ Tax Reform Initiatives
- ◇ Tax Incentive Consulting



RISK MANAGEMENT

- ◇ Commercial Property
- ◇ General Liability
- ◇ Fleet Auto
- ◇ Workers' Compensation
- ◇ Directors and Officers (D&O)
- ◇ Surety Bonds
- ◇ Cyber Liability Insurance



OUTSOURCED ACCOUNTING & BILL PAY

- ◇ Monthly Financial Statements
- ◇ Inventory Management Processes
- ◇ Accounts Payable and Receivable
- ◇ Controller and CFO Functions
- ◇ Reconciliation, Budgeting and Cash Flow Analysis



BUSINESS VALUATIONS

- ◇ Succession/Exit Planning
- ◇ Executive Compensation Analysis
- ◇ Divestiture of Subsidiary or Division
- ◇ Review of Debt Securities
- ◇ ESOP Feasibility Studies
- ◇ Purchase Price Allocation



PAYROLL SERVICES

- ◇ Accurate and Simplified Payroll Processes
- ◇ Timekeeping and Time Off Scheduling
- ◇ Onboarding Processes
- ◇ Talent Acquisition and Performance Management
- ◇ Benefits Enrollment and ACA Reporting
- ◇ Feature Rich HR Tracking



M&A AND CONSULTING

- ◇ M&A Advisory
- ◇ Turnaround Services
- ◇ Investment Banking
- ◇ Internal Controls and Operations



LEGAL

- ◇ Real Estate Transactions
- ◇ Buy-Sell Agreements
- ◇ Business Incorporations/LLCs
- ◇ Litigation Support
- ◇ Powers of Attorney
- ◇ Employee Benefit Plan Legal Services

*Creative Planning is an independent wealth management firm, also providing business consulting, tax and financial services to clients. Creative Planning works closely with BerganKDV, an independent and separately governed licensed CPA firm that provides audit and assurance services to its clients.