O'Brien, Riley & Ryan is a full-service firm. Whether your needs are assurance, tax, or consulting-based or anything in between, we are here to help with your individual situation. Our professionals do not just focus on the financial mechanics of the tax or audit process. We believe each client realizes significant added value from the comments and observations we make during an engagement. Proactive planning and communication maximizes your desired results.

Personal Needs

We tie together your personal and business blueprint. To create the best solution, we look at the whole picture and not just the individual pieces. ORR's professionals will design and monitor your overall business health. Whether that means creating an estate plan so assets flow to the next generation by choosing the right vehicle to meets your needs, preemptive tax planning to maximize taxes, or any other service we can provide. We'll help guide you through life's moments, both big and small. No matter where you are in life – from marriage to children or college to retirement. We can help create a plan that addresses your objectives along the way.

Services Overview

- **Tax Services:** A mythical goal is that your tax liability can be eliminated. Taxes need to be paid by everyone. Our role is to help you create a tax plan tailored to your business and personal financial position.
- **Audits, Reviews, and Compilations:** Financial statements have become increasing complex. Our experienced accountants understand how to thoroughly conduct an audit or review, or are here to help prepare a compilation.
- **EBP Audits:** Dealing with ERISA can be challenging for many. Our professionals have over 25 years of experience auditing various types of plans. Let us help ease the burden of the EBP audit by providing a thorough and well-organized approach to 401k, 403b, Pension, and Defined Benefit Plans. As members of the AICPA's Employee Benefit Plan Audit Quality Center, we help perform audits of single, multi-employer, and collectively bargained plans, as well as ESOP, Taft-Hartley, and Health & Welfare plans.
- **Accounting:** Accurate and timely financial information is critical to the success of every business. It helps manage cash flow, and is used to evaluate pricing decisions, costs, create budgets and manage resources. Whether you need us to become your accounting department to just helping you close the books, we can help.
- **Part-Time CFO:** At some point, many businesses or organizations need more than a bookkeeper, but may not need a full-time financial executive. Our professionals are trained to identify process improvement opportunities to help an organization add to its profitability. From accounting, such as invoicing, account receivable, accounts payable, inventory decisions, and debt or financing needs, to budgets and forecasts, our professionals can be of assistance.
- **Advisory:** There are times when you, as a business owner, need more than just accounting or tax services. You need a fresh perspective on how to transition your business, whether that's to grow, transition, or possibly exit it. Our professionals provide a fresh perspective and incorporate technical expertise and tax strategies to help you accomplish your goals.
- **Exit Planning**: If you are in the process of selling, closing, or transferring your business to someone

else now or within the next five years, creating an exit planning strategy is a must. Learn more about the steps you can take and pitfalls to avoid when working your way through this complex process.

- **Business Valuation Services:** Are you planning to retire, gifting your business, considering a merger, or entering into a buy-sell agreement? Before you do, talk with us. Understanding the current value of your business and its assets may be invaluable to help grow or maintain its value. An independent appraisal of your business and its assets may be essential in determining its value. Our valuation professionals have practical experience and have the necessary abilities to perform the appraisal you need.
- **Family Office Services:** We assist families with their monthly bill paying or other financial tasks to help alleviate you of the administrative burden. We offer services, such as scheduling bill payments and account reconciliation, bank and brokerage statement reconciliation, cash flow analysis, credit monitoring, and so much more. We are here to help coordinate with you to manage the tax, and financial activities of your family.