

WHIPPLEWOOD CPAs



YOUR
SUCCESS
IS
OUR
SUCCESS



About Us



“WhippleWood is a very proactive firm. They keep pace with my deadlines, quickly respond to my questions, and encourage year-end tax planning meetings. In every sense they are a team member.”

– Centennial Investment Advisors

WhippleWood CPAs has been providing accounting, tax, and business consulting services to a wide range of business and individual clients for more than 50 years. Our clients are located throughout the United States and abroad.

Our professional staff members come from a variety of backgrounds, including national and local accounting firms, banking, and the oil and gas industries. We believe this diversity gives a broad and well-rounded perspective to our work and client relations.

In addition, our staff members are highly qualified. A number hold advanced/graduate degrees from nationally renowned institutions. We are experienced in handling complex tax matters and strategic tax planning.

WhippleWood CPAs routinely establishes ongoing relationships with advisors from other professions, including legal, banking, financial planning, investing, and insurance services. These relationships contribute to a **“Team”** approach in serving our clients’ needs. We take great pride in providing personal service to each of our clients, efficiently, and effectively. We are committed to serving you in the development and accomplishment of your own personal goals.



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What We Do



“I have used WhippleWood CPAs since 1991. The main reason is not just about the accounting work, but more importantly the relationship with the partners and all of the staff, the high quality of work for the price, the availability for any question anytime, getting up-to-date information and education on a regular basis.”

– McDonald’s Franchise Owner

WhippleWood CPAs offers a wide range of services to our individual and business clients. Our clients benefit from personalized, quality services that are beyond comparison. Some of these services are listed, with brief descriptions.

Tax Services

We prefer to take a proactive approach to tax services. By keeping current on new tax laws and regulations, we position ourselves to identify key tax planning opportunities that minimize present and future tax liabilities alike. Throughout the year, we provide our individual and business clients with the taxation expertise and knowledge they need and deserve. Tax services offered include but are not limited to:

- Tax planning and return preparation for: Individuals, Corporations, Partnerships, LLCs/LLPs, Estate, Trust and Gift, Not-For-Profit organizations
- Taxing authority representation
- Divorce and maintenance/support issues
- Tax effects of buying/selling a business

Tax Planning & Preparation

Whether you are an individual, a multi-tiered corporation, or a partnership, our experienced staff will develop tax strategies that take advantage of tax laws and new legislation to benefit your situation. We use the most highly regarded tax preparation and tax research software.

Business Entity Selection

Choosing the correct entity type for your business (i.e., “S” or “C” corporation, sole proprietor, LLC/LLP, etc.) is a crucial decision that can have long-lasting tax implications. We will assist you in evaluating the pros and cons of each entity type in order to determine the one that’s most appropriate for your company.

Estate & Trust Tax Preparation

The preparation of estate, trust, and gift tax returns, ranks among the most important work we do. The tax rates for estates and trusts are the most onerous taxes assessed. We have the experience and knowledge to properly prepare these returns to minimize the tax liability.

IRS Representation

Over the years, we have gained valuable expertise in dealing with the numerous taxing authorities that exist at all levels. WhippleWood CPAs has achieved a level of competence that ensures our clients are properly represented before these agencies.



Consulting Services

This is the name of the game. Before you buy or sell a business or develop a strategic plan, talk to us first. Anything not in the normal course of business may have adverse tax consequences that can be avoided. Let us play the “*Devil’s advocate.*” We will assist with:

- Accounting software selection and implementation
- Buying and selling a business
- Computer systems
- Estate, trust, and gift planning
- Financial and retirement decisions
- Like-kind property exchanges
- Record retention and statute limitations
- Tax compliance and filing requirements
- Type of entity selection

Accounting Services

We are committed to providing financial information to our clients in a timely and accurate manner. Meaningful, well-organized financial records ensure that your business operations will run more efficiently and effectively on a daily basis. We provide a full range of cost-effective accounting services, including, but not limited to, the following:

- General ledger and financial statement preparation
- Bookkeeping – monthly, quarterly, annually
- Accounting system setup for new businesses
- Personal financial statements
- Litigation support
- Financial Statements

Quickbooks Professional Advisors

We can efficiently train on Quickbooks and troubleshoot problems.

Cash Flow & Budgeting Analysis

A business can be profitable and still run into trouble relating to cash flow issues. We will forecast and evaluate your company’s financial condition, estimate financing requirements, and track cash flow sources and uses.

Sales & Use Tax Services

We will assist your company in the compilation of information and preparation of sales tax returns for any and all jurisdictions, and with the complicated application of business use tax issues.

Technology Consulting

We have in-house IT specialists to help with your technology needs.



Accounting Software Selection & Implementation

With the number of computerized accounting software packages available for small businesses and individuals growing every day, selecting the one right for you has become increasingly difficult. As accounting professionals, we are exposed to most programs through trade journals and actual use. Our staff will help you choose and implement the system that best fits your needs.

Buying & Selling a Business

Our staff has experience to guide you through the acquisition/disposition process by addressing such issues as cash flow analysis, owner succession, and tax considerations.

Payroll Services

We will assist your company in implementing the necessary procedures required to comply with the rules and regulations of payroll accounting and compliance. We can prepare all necessary payroll tax returns.

Retirement Planning

Successful implementation and periodic review of your financial plan will ensure financial independence during your working years and throughout your retirement years.

CFO Services

Outsource any or all of your in-house accounting or accounting management to us. We can make this tough work more manageable.



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