



2012



Our Vision

We are building a dynamic organization of innovative and creative people that are dedicated to being the professional adviser of first choice for our entrepreneurial clients. Our people are always seeking new and exciting ways to create a better future for our clients and us.

Our Vision for 2012

The following Vision creates the framework for building this dynamic organization.

// Growth-driven entrepreneurs in our industry niches seek us to represent them. We have a firm of bright and ambitious professionals whose primary focus is shaping a successful financial future for our clients. We have enhanced the expertise available within our firm by partnering with strong strategic alliances. As a caring, consultative group of professionals, clients look to us for financial advice to help them make sound and informed business decisions.

The firm's client-base consists primarily of two segments:

1) entrepreneurial owned and operated businesses, many of which have expanded outside of the U.S., and 2) foreign-owned entrepreneurial companies with operations located in North America. //



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Guiding Philosophies

ENVIRONMENT – We are committed to a friendly culture that encourages personal growth, trust, and open communication

MANAGEMENT – We encourage all team members to participate in the direction the firm is taking through involvement in committees, task forces, and strategic planning

PEOPLE – Without a doubt, people are our greatest competitive advantage. We are committed to developing people through challenging client assignments, professional training, and advancing responsibilities within the firm

ONE OFFICE – We will maintain one office to facilitate maximum personal interaction and a positive atmosphere

WORLD CLASS – We strive to be a leader in providing quality and responsive client service

EQUITY – We will remain financially strong through reinvestment and limiting outside debt. We will continue to develop leaders for the long-term succession of the firm

REPUTATION – Realizing that a world-class reputation will attract first class staff and clients, we demand the highest degree of professionalism by everyone

ENERGIZED – Our efforts will reflect that we are enthused with the role each of us plays in servicing our clients and fulfilling our firm responsibilities. Compensation is based on the value each staff person provides in helping to achieve client and firm objectives

DEDICATED – We are committed to helping each other and achieving the goals we set together

EMPOWERED



Although the business climate in Southeast Michigan will always be highly competitive, our goal is to increase our revenue base an average of 10 percent per year, while maintaining a diversified client base that is made up of entrepreneurial owned and operated businesses.

We will continue to pursue the following target markets:

Owners of growth-driven, middle-market companies – We will develop strong business relationships with the owners and decision makers of these businesses in a variety of industries such as:

- Manufacturing/Distribution
- High Technology
- Business and Professional Services
- Construction Contractors
- Real Estate Development
- Internationally-Minded Entrepreneurs
 - Inbound – U.S. based operations of foreign-owned companies
 - Outbound – Domestic companies doing business outside of the U.S.
- Clients of CPA firms who utilize our technical resources as part of the AST program

We will not accept the following types of engagements:

- Audits of publicly-held companies
- Audits of financial institutions
- Governmental “yellow book” audits
- Audits of not-for-profit organizations

We define a “model” client as:

One who seeks and respects professional advice, has high integrity, uses a variety of services we provide, has an entrepreneurial spirit, is growth-driven, and will pay promptly for the value of our service.

Generally, our clients fit one of the following profiles:

- Middle-market, growth-driven companies (generally \$5M-100M in sales) requiring audit, accounting, and tax services, as well as a wide range of our consulting services
- Smaller and emerging businesses requiring accounting, tax, and general business advisory services
- Larger, professionally managed organizations (generally above \$75M in sales) requiring specialized tax or business consulting services



Our greatest competitive advantage is our people.

We continue to build our team with professionals who, in addition to creative problem solving abilities, have excellent technical, leadership, entrepreneurial, communication, and marketing skills. Our professionals possess a high level of integrity, innovation, and dedication to the firm and its clients.

As the labor force continues to change, so does our need to provide a flexible work environment to reflect quality of life issues and increasing client expectations. Utilizing advanced technology, some team members “telecommute” or work flexible schedules to accommodate personal and career goals, but always with the objective of providing world class, responsive service to our clients.

Our professionals work in an industry or service niche team environment with each person possessing expertise to provide the highest level of value to the client and to the firm.

We are committed to providing skill building programs, advanced technology, a unique employee culture, and a “client-centered” environment that meets the needs of staff while ensuring clients are being serviced with priority and respect. Skill building programs focus on technical, business advisory, niche expertise, leadership, management, communication, and selling skills. Our internal and external skill building programs provide for individual career paths offering personal and professional growth in our areas of expertise.



The internet and electronic communication is pivotal to our business operations. How we communicate with our clients, strategic partners, and members within our national and international associations will be continually enhanced through the use of portals and real time computer systems. High speed internet connections will continue to close the gap between our clients' technology and our own, in part by providing real time access to

data. In addition, our website will serve as an interactive knowledge base, enhance our capabilities, fill our human resource needs, and provide information to assist our clients in improving their bottom line.

We will continue to expand our wireless communication and remote access capabilities. The use of electronic imaging is allowing our staff, telecommuters, and consultants complete access to client files. Voice recognition software will increase the efficiency of data entry. Teleconferencing will allow us to expand our market area by allowing us to provide “face-to-face” service to clients wherever they are located. In addition, we envision the development of an Intranet that will allow staff who are not physically in the office to access data and information regarding the firm's daily activities, policies, and procedures.



As we move forward, the need to provide in-depth, specialized consultative services will become increasingly critical. We will continue to identify evolving professional services in niche consultative areas while maintaining strong core competencies.

Our core competencies include:

- Complex federal and multi-state tax planning
- Global tax and foreign entity structure planning
- Accounting, assurance and tax preparation services
- Financial modeling and consultation
- Evaluation of financing requirements and funding sources
- Installation and support of accounting and management information systems
- Business improvement advice
- Family wealth preservation
 - Business succession planning
 - Estate and financial planning
 - Investment advisory services through Clayton & McKervey Financial Group

Our billing practices will be based on **“value pricing”** philosophies, instead of hours worked, to recognize the value received by the client versus the production time necessary to provide the service.

We will utilize a **“niche team”** approach. Clients are serviced by a team that provides the industry expertise and partnering relationships that help to enhance the profitability of these clients.

We will continue to maintain relationships with other professionals who can assist our clients and their global business interests with legal, financing, insurance, computer, and information management, as well as other highly specialized business consulting services. We will also continue to align ourselves with strong strategic partners that offer our clients **“best in class”** expertise in addition to our core competencies. These partnering relationships with uniquely qualified specialists will allow us to do joint projects and marketing.

Our partnering relationships will include experts in:

- Investment Banking
 - Merger and Acquisition
 - Financing/Equity Sources
- Specialized Business Valuations
- Specialty Tax Expertise (i.e., Cost Segregation Studies and R&E Credits)
- Human Resources
 - Staffing – Temporary and Permanent
 - People Development and Compensation Planning
- Leadership Development and Executive Coaching
- IPOs, Public Funding and Securities Work
- Restructuring and Turnaround Management
- Litigation Support and Consulting

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