



Executive Overview





Collaboration

Providing a proactive and open exchange of ideas to manage your needs.



Analysis

Identifying and tracking key performance indicators that impact success.



Strategy

Creating and helping you execute the blueprint to achieve your goals.



We Go Beyond the Numbers

Our team listens, interprets and provides clients objective insight. We take the time to understand their goals and design a strategy unique to their needs. Our firm provides clients with the information to successfully manage their business and everyday lives.

We Are Tax Strategists

We provide tax planning, reporting and compliance for individuals and organizations. Taxes can substantially impact profitability. Let us create a tax plan to help optimize your tax position.

We Are Audit Professionals

Our assurance team will provide audited, reviewed or compiled financial statements to help validate the accuracy of information and provide insight, while minimizing risk.

We Are Your Solution

Can your accounting firm take you to the next level or help with a family succession or an exit strategy? Give us thirty minutes. We want to make you excited, not comfortable, about your relationship with your accounting firm.

Transformational Growth Specialists

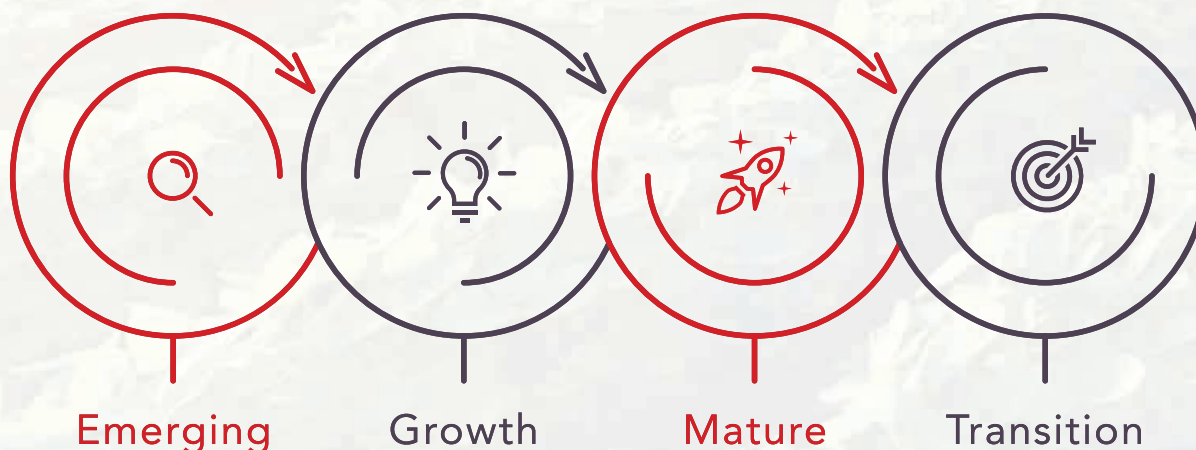
We excel at transforming companies as they move through each stage of their life cycle. Our focus is to help clients execute their growth plans, provide objective leadership support, and create financial reports and tax strategies that make an impact. We track critical success factors and measure progress toward goals using key performance indicators, helping management overcome obstacles and assess opportunities.

Customizable Solution

Our professionals develop accounting processes, tax strategies, and financial reports that add value and put them in a better position to make decisions. We support entrepreneurial driven businesses seeking long-term growth or who want a rapid turn to help prepare the company for sale. We customize the accounting function, provide insight on cash-burn rates and cash-flow, manage payroll and benefits, conduct due diligence, act as a fractional CFO, and provide financial leadership or support in-house financial leaders.

Every Business Evolves

Let us help you navigate through the different life cycle stages. Each phase requires a different focus with different needs, obstacles, and opportunities.







Managed Accounting

Outsourced Accounting
Key Performance Indicator Tracking
Bill Payment
Cash Management & Improving Cash Flow
Payroll Service Management
Accounts Receivable Processing
Cost Accounting Support
QuickBooks Support



Tax Strategies

Businesses & Individual Support
Federal, State, & Local Tax Preparation
Payroll Tax Filings & Sales Tax Returns
Estate, Trusts & Beneficiary Taxation
Wealth Transfer & Gifting Strategies
Family Wealth Transfer Strategies
Succession, Transition, & Exit Planning
IRS Communications



Financial Reporting

Audited Financial Reports
Reviewed Financial Reports
Compiled Financial Statements
Employee Benefit Plan Audits
Agreed Upon Procedures
Internal Controls & Fraud Prevention
Merger or Acquisition Due Diligence



Advisory Support

Goal Setting & Budgeting
Business Plans
Profit Refinement Strategies
Financial Forecasts & Projections
Benefit Plan Evaluation & Selection
Exit Planning & Family Succession
Special Projects



Make an Impact

We are not a reactive CPA firm. Filing tax returns and developing financial reports are a core function every organization needs, but those items should be secondary to the planning and strategy your accounting team has created with you. Our professionals provide proactive, forward thinking services. We will assist in your thought leadership initiatives and help work toward maximizing the succession of your organization.

Entrepreneurial Support

We are CPAs with experience owning and managing other businesses. Ask your CPA if they have owned anything outside of their accounting firm. We understand the pressures of managing inventory or working in an environment where there are moving pieces such as heavy machinery, tools, specialized equipment, products that spoil, and how to manage waste and shrinkage.

Closely Held Businesses

Our role is to help implement an owner's vision, grow and preserve their assets and help them build family wealth. We help owners develop accurate and timely financial reports, create a tax plan and manage their accounting. Our team provides objective insight and counsel. We act as a sounding board to talk through ideas.

High-Net-Worth Individuals

Our tax professionals will create a tax strategy, file returns, assist with estate planning, gifting, trusts and the overall protection of family wealth.

Start the Conversation

Change is not easy, but the cost of using the wrong CPA firm can be expensive. Give us thirty minutes to show you how Lucke can help make an impact.

(316) 721-9020 | LuckeCPA.com



“Going Beyond the Numbers”

Lucke
accountants | advisors

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