



Passionate About Their Clients, Passionate About Their Business

Vertical Advisors LLP is a full-service boutique accounting firm. Recently, the firm found success in CV's Corporate Excellence Awards 2019 where they were selected as the California's Leading Boutique Accounting Firm – 2019. Following this win, we profile Vertical Advisors and caught up with Peter DeGregori, the Managing Partner of the firm, who provided us with insight into the successful accounting firm.

Established in 2007, Vertical Advisors is a unique CPA and Business Advisory firm that takes a more tactical and strategic consulting approach to enhance their clients accounting, taxation and business strategy.

The boutique accounting firm provides all the services of a traditional CPA firm, but focuses more on tax and business strategies, ratio analysis, as well as other consulting to assist their clients with making their income taxes lower, businesses more efficient, and profitability and expense management. Primarily serving privately held businesses with a gross revenue of \$10MM to \$150MM and their owners, Peter begins by outlining the clients that Vertical Advisors serves, as well as the services they provide them.

"Here at Vertical Advisors, our clients are looking for tax strategies and business advice. On average, they also have more complexities regarding multi-state income tax, payroll, and sales tax requirements. All of these items can increase the

complexity of a tax return. "Also, our clients want additional information to help them run their businesses better. As such, we work with our clients to understand their areas of importance and then we will create different key performance indicators (KPI's) or ratio analysis to assist with monitoring business operations."

Some of the items Vertical Advisors focuses on are entity classification, compensation and benefits, buy-sell agreements, corporate formalities, estate planning, life insurance, stock options, tax business strategies and many other similar items. In addition to this, the firm also works alongside other professional specialists in a team approach to find the most beneficial solutions for our clients. When discussing the internal culture, Peter is keen to reveal the significant role the team plays in the overall success of Vertical Advisors, highlighting how the firm works closely with its clients to ensure they receive their ideal outcome.

"Overall, we try to provide peace of mind regarding business, tax, and accounting so the owners

can focus on their business goals. We have spent years working alongside business owners helping their company become more financially efficient, reduce income tax and provide them with an overall enhanced business strategy."

In the future, the team at Vertical Advisors will continue to deliver an impeccable service, which not only ensures that they meet the requirements which have been set by their clients, but also surpasses their expectations. Moving forward, Vertical Advisors hopes to build upon the numerous accomplishments they have achieved over the years, which includes being selected in Corporate Vision's Corporate Excellence Awards 2019 where they were righteously awarded



the accolade California's Leading Boutique Accounting Firm – 2019.



VERTICAL ADVISORS, LLP
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