



Engineering Group

We measure our success according to your success. Naturally, our client service philosophy focuses on going beyond the basics to meet client needs.

Our A/E Experience

Our A/E clients include numerous firms in the NY/NJ metropolitan area ranging in revenues from \$300,000 to over \$500 million, including MEP, civil, environmental and other traditional A/E firms; firms with WBE, MBE, SBE and DBE designations; firms whose clients are almost 100% from the public sector and those who do not work on any government projects; firms whose corporate structure is as an LLC, S-Corporation or C-Corporation; firms who have basically 1 majority owner and firms whose ownership is either through an ESOP or spread out among multiple shareholders; and firms that are just starting out with one employee and need a lot of hand holding, to firms with formalized audit committees that do business internationally.

Our Approach

Upon obtaining new clients, we prefer to spend time up front in face to face meetings to get a deep understanding of the client's current business processes and needs. Additionally, we are very "hands on" in the fact that we like to ask engaging questions about the company – its past, present and desired future. Our ultimate goal is to get to know you and develop a relationship of trust and transparency at the commencement of our partnership. Often, our discussions will go way beyond tax returns, debits and credits and other important technical accounting information, to also include the firm's strategy for growth, leadership transition and development, culture, employee benefit programs, risk analysis, and many other areas.

Practice Leadership



Paul Peterson
CPA, MBA



Michael LaMotta
CPA, MST



Amos Gibello
CPA



Paul Ursich
CPA

Our Service Value

At Wiss, like most other public accounting firms, we are continually assisting our clients in their tax and accounting compliance requirements through financial statement audits, reviews and compilations and through the preparation of tax returns. Due to our industry depth and experience, during those engagements we have been able to help clients minimize taxable income and obtain all available tax credits while also ensuring that the "books and records" are accurate, useful and meaningful to owners, management and interested third parties.

What sets Wiss apart is the fact that our involvement with our clients goes beyond the scope of traditional services. Examples include the following:

- Due diligence in connection with our client's potential purchase of an engineering firm in NYC.
- Consulting provided to minority shareholders in connection with ownership transition for a NJ environmental firm.
- Internal control study, analysis and report for a design firm with revenues over \$200 million.
- Providing Deltek and QB consulting, implementation and optimization for multiple engineering firms in the NY/NJ area.
- Deferred compensation plan consulting for a design firm in NJ that was looking to set up a plan to retain key management.
- Overhead audits and reports for over 12 firms annually with revenues from \$2 million to over \$500 million in NY and NJ.
- Assisting firm shareholders with estate and trust planning in cooperation with our Director of Estate Planning.
- Quarterly financial analysis and efficiency consulting for an MEP firm in Pennsylvania.
- Helping multiple engineering firms navigate a purchase by an outside firm.
- Assistance placing qualified accounting staff with a client through our Director of Talent Acquisition.
- Investment and personal financial planning in connection with our Wiss Private Client Advisory group.

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