



***Advance With Confidence***

Tax and Audit

Forensic Services

Strategic Planning

Business Performance

Start-up to Exit Strategy

***Leading the way***

Putting client goals at the forefront. Relax and know that we are your strategic partner.



# Stuffed Shirts?

At Fox Byrd & Company, we are not typical professionals. We're not just waiting for the phone to ring. Instead, we act as your proactive strategic partner. We get to know you, your goals and objectives, and we work with you to make your goals a reality.



*“Extremely knowledgeable of our company and business, and always provides advice and solutions.”*

*Client CFO*

## About Fox Byrd

We are a Dallas-based CPA firm offering accounting, auditing, tax planning, tax compliance and business advisory services. We've served clients in the Dallas area and across the country for over 50 years. The practice was established in 1958 by Edward C. Fox, Jr., and over the years we have grown by attracting and selecting new clients, and through strategic mergers.

“Same team for over 10 years and love that. Wouldn't want to train another team.”

*Firm Client*

Committed to excellence, we have the skills and resources to assist you in reaching your business and financial goals. We offer close personal attention and a continuum of services for every phase of your financial life, from opening the doors of a new business through the years of retirement. We have earned the trust of our clients by listening, collaborating, advising, planning, and then implementing sound and effective business and financial strategies.

*“As outside advisor - good;  
gives objective view”*

Client CEO

**Serving**  
Startups  
Privately-Held Businesses  
Family Businesses  
Financial Institutions  
Municipalities and Other  
Local Governments  
Individuals  
Trusts and Estates  
Not-for-Profit  
Organizations

## What We Do

**AUDIT** The firm is a trusted provider of financial and SSAE16 audits for businesses, financial institutions, municipalities, other local governments and non-profits. For clients that do not require a full-scope audit, we can perform a financial statement review, which is less costly than an audit.

**TAX** The firm has a breadth and depth of expertise in tax planning and compliance for individuals, corporations, partnerships, limited liability companies, trusts and estates.

**FINANCIAL SERVICES** **Banks and Credit Unions.** Among banks and credit unions, the firm's reputation has grown over the years, as its expertise and services have adapted. We are well-equipped to help you address the myriad of issues facing community banks and credit unions today.

**STARTUPS** From organization and planning to fundraising, launching and marketing, the firm has extensive knowledge and experience in navigating the unique world of startup businesses.

**EXIT STRATEGIES / SUCCESSION PLANNING** Many business owners are in urgent need of an exit strategy, exit transaction advice or succession planning. Even businesses expecting to continue operations need to plan for transition of leadership and development of management. We have been integral in this process for many clients.

**ACCOUNTING AND FINANCIAL OVERSIGHT** **Financial statement preparation and analysis.** From bookkeeping to financial statement preparation and financial analysis, the firm handles these functions efficiently, effectively, and in a way that provides clients with useful management information.

**MUNICIPALITIES / LOCAL GOVERNMENTS** The firm has extensive experience and expertise with municipalities and other local governments, providing auditing, accounting and related services.

**FORENSIC ACCOUNTING** The firm is well-equipped to handle investigative accounting projects such as fraud investigations or litigation support.

**CONSULTING** Many clients call upon the firm's business and financial expertise when in need of assistance with a variety of business matters, such as the design of executive compensation plans, mergers and acquisitions, financial restructuring or addressing market barriers, just to name a few.

**STRATEGY AND PERFORMANCE MANAGEMENT** **Map your success.** Success in business depends upon knowing where you are going, effectively utilizing resources to get there, and knowing if you are making the needed progress, or if course corrections are needed. The firm can help you step through that process in a way that is both effective and simplifies operational management.

**FRAUD CHECKUP** **Designed for businesses and organizations.** An often overlooked aspect of risk management is the assessment and minimization of fraud risk. The firm has developed a cost-effective Fraud Checkup that can help you address the risks of fraud in your organization .





Over 95% of our clients in our recent client survey say we

- Provide clear and concise information
- Deliver work product on time
- Keep them informed, no surprises

# accounting, assurance consulting & tax

**tax planning** privately-held companies  
internal control & external audit  
fraud investigation  
business performance management  
**SSAE 16** family businesses  
financial institutions internal audit  
local governments  
**not-for-profit organizations**  
trusts & estates exit strategies start-ups  
**succession  
planning**



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