

Cohen & Company

Firm Overview

Named one of the fastest growing private companies in the country, Cohen & Company® offers assurance, tax and advisory services to clients throughout the U.S. and worldwide. The firm serves a broad range of clients, from privately held companies and their owners; to public and private funds, advisers and fund service providers within the investment industry; to Fortune 1000 multinational and institutional enterprises.

A Strong Foundation

Cohen & Company clients experience several key differentiators:

- ◆ **Top-Tier Talent.** Our firm has strategically created an environment ripe with competitive advantage. We attract the best-of-the-best from national firms, and recruit from numerous universities across the country. Importantly, we train and expect all of our associates to conduct the highest caliber work.
- ◆ **Industry Leaders.** We are deeply involved in evolving legislation, the AICPA's audit of the future initiative and technology advancements, such as robotic process automation. Participating on various AICPA expert panels also allows us to help guide accounting standards in complex industries, such as the investment industry.
- ◆ **Dedicated Teams.** With an average partner tenure of more than 15 years, our teams provide clients with national-level expertise and a partner-led, hands-on experience generally only experienced with boutique firms.
- ◆ **Unique Tax Focus.** Founded on identifying tax savings opportunities, we have a deep bench of expertise. Our more than 200 tax practitioners focus on everything from federal, state and international tax; to tax credits and incentives; to the evolving world of taxation as it relates to digital assets.

Industry Thought Leaders

Members of our firm serve or have served on numerous prominent industry boards and committees:

- ◆ AICPA Board of Directors
- ◆ AICPA Auditing Standards Board
- ◆ AICPA Investment Companies Expert Panel
- ◆ AICPA Private Companies Practice Section Technical Issues Committee
- ◆ AICPA Dynamic Audit Solution Committee
- ◆ AICPA Digital Asset Working Group
- ◆ ICI Tax Advisory Group
- ◆ SEC Working Groups

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Fast Facts

Cohen & Company is focused on continued growth, but never at the expense of quality. We have strategically grown our firm to what it is today:

- ◆ **More than 650 professionals** in 10 offices across seven states and, through affiliated entities, the firm has an international presence in the Cayman Islands and Ireland
- ◆ **Repeat winner of the Inc. 5000 award** recognizing the fastest growing businesses in America
- ◆ Recognized as **one of the country's top tax and accounting firms** in Forbes' 2022 list of America's Best Tax and Accounting Firms
- ◆ **5th largest provider** of audit and tax services to registered funds in the country (Audit Analytics)
- ◆ **10th largest provider** of audit and tax services to hedge funds in the U.S.
- ◆ Received a **2021 Net Promoter Score of 87** measuring overall client satisfaction – well above what survey benchmarks consider “world class” service and satisfaction

Extensive Quality Control

Our firm has been registered with the PCAOB since 2003. Cohen & Company is one of only 12 firms (out of more than 1,700 PCAOB registered firms in the U.S. and abroad) inspected annually — due to our large number of SEC-issuer clients. As one of the select few on this list, we are held to the same strict level of scrutiny as the largest firms nationwide in assessing compliance with professional standards. Our attention to detail has resulted in our most recent inspection (2019) being completed with zero engagement performance issues — a result unmatched in the industry.

Our firm also is subject to the AICPA Peer Review, conducted by an independent public accounting firm every three years over the portion of our practice not subject to PCAOB inspection (non-issuers). Our firm has participated in this process since its inception. We have received the best possible rating in each review in our history, including our most recent peer report in which we received the prestigious “pass opinion.”

How we can help with your tax, assurance and advisory needs

Tax Planning & Compliance

- ◆ Federal tax planning and compliance
- ◆ State and local tax planning and compliance
- ◆ Sales/use tax consulting
- ◆ Tax credits and incentives
- ◆ Entity structuring
- ◆ International filings and structuring

- ◆ Tax outsourcing/staff insourcing and augmentation
- ◆ Executive tax planning and compliance

Assurance

- ◆ Audits
- ◆ Reviews and compilations
- ◆ Attestation engagements
- ◆ Employee benefit plan audits
- ◆ SOC readiness and compliance
- ◆ GIPS® verification and performance examinations

Advisory

- ◆ Strategic planning
- ◆ M&A advisory
- ◆ Management consulting
- ◆ Transaction services
- ◆ Turnaround and restructuring
- ◆ Business valuations
- ◆ Risk assurance and advisory
- ◆ Cybersecurity
- ◆ CFO solutions
- ◆ Real estate advisory
- ◆ Family office services



It starts with a conversation

We'd love to talk with you to see how we can make a positive impact on your business. Contact one of our leaders below.



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Foundational Principles

Purpose: To engage, teach, inspire and improve lives through the power of knowledge and trust.



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Cohen & Company is a nationally ranked accounting and consulting firm with more than 650 associates serving clients throughout the U.S. and abroad. Find blogs, webinars, other thought leadership, firm news and events at cohencpa.com.

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