



CPAs & Advisors

**WRDR**

WERMER, ROGERS, DORAN & RUZON, LLC



Trusted  
Advisors

Passionate  
Approach



Engaged  
Professionals

## Over 50 Years of Experience

Wermer, Rogers, Doran & Ruzon, LLC has been serving the Joliet area and surrounding communities since 1957, and is currently the largest locally owned accounting firm in Will County. We are a full-service CPA firm delivering accounting, tax and audit solutions to meet the advisory and compliance regulatory needs of our clients. Our professionals are experienced, highly trained and well-versed in a variety of industries. We bring the expertise of a large firm with the personal attention and individualized approach you can only receive from a local, mid-sized firm.



Solutions  
Driven



## Comprehensive Support

At WRDR, we focus on providing support to meet the needs of our clients throughout their lifecycle. Whether they are establishing a new business, working to grow their company or planning for retirement, our services help organizations enhance processes, become more efficient, measure and assess risk and make an impact on their profitability or achievement of a mission. We have detailed some of these services below.

### Assurance Services

- Audits, Reviews & Compilations
- Employee Benefit Plan Audits (ERISA)
- Agreed Upon Procedures
- Internal Controls & Internal Audit Outsourcing

### Leadership Partnership

- Growth Strategies
- Goal Setting & Progress Monitoring
- Family Succession Planning
- Exit & Transition Strategies

### Valuation & Litigation

- Buy-Sell Agreements
- Mergers & Acquisitions
- Executive Compensation Plans
- Valuation & Litigation Consulting

### Benchmarking

- Managed Accounting / Outsourcing
- CFO | Controller Services
- Accounting System Design Services
- Audit Preparation Assistance
- QuickBooks™ Support

### Tax Matters

- Tax Lifecycle Support
- Income Tax Planning
- Business & Personal Return Preparation
- State & Local Tax Services
- Estate Plans & Trusts
- Family Gifting & Philanthropic Strategies
- Tax Authority Communications & Representation
- International Tax Issues

### Solutions for You

We invest in our client's success. At WRDR we don't just focus on numbers; we get to know our clients and their goals so we can provide a team of professionals and solutions that best meet their needs. We learn what drives their organization and regularly meet with clients to plan and monitor progress. Our Partners are involved and accessible throughout the engagement to provide individualized support to help clients excel.

### Our Clients

Our clients include for-profit businesses, not-for-profit organizations, government agencies and high net worth individuals. With every client we seek to become their financial resource and business consultant by helping them identify opportunities, implement strategies and plan for their future. We realize each client is unique, but our extensive experience, in-depth knowledge and tailored approach ensure you receive comprehensive support to help you navigate even the most difficult challenges.

## A Network of Resources

WRDR is affiliated with INPACT Americas. INPACT is an international alliance of independent accounting firms affiliated to meet the challenges of a global marketplace. This global network provides us access to the latest cutting-edge accounting technology, successful accounting models and strategic business practices. Our membership strengthens our services and ensures that we can deliver creative ideas and solutions to help you achieve your goals.



Moving the Needle Forward!

[www.wrdr.com](http://www.wrdr.com)

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