




privately held businesses





practical guidance to grow your business and preserve your wealth

Building, growing. Buying, selling. Families, partners, friends. Privately held businesses come in many forms. And each is uniquely influenced by its owners and their personal talents, dreams and goals.

At Cotton + Allen, our practice has been focused on privately held businesses since we began in 1921. We are very familiar with the challenges and opportunities faced by businesses of this nature—after all, Cotton + Allen is a privately held business itself.

For our privately held business clients, we provide traditional tax, audit and accounting services along with a range of other services especially important to this type of business, including succession planning and exit strategy consulting, business planning, gift and estate tax planning, retirement and employee benefits planning, and business valuation services.

succession and exit strategy planning

It's never too early to consider your future. When do you want to retire? Who will take over your company? What are your corporate goals and how do your future plans support them? We can help you think through these issues and create flexible plans to help smooth the transitions. In fact, we've already managed a smooth, effective transition to new management several times in our firm's history.

estate and gift planning

Our estate and gift team works with you, your attorneys and other financial advisors to tailor solutions to fit your specific needs. We can create estate and gift plans that transfer wealth at minimum tax cost.

buy-sell planning

Any business with multiple owners needs a buy-sell agreement to ensure the orderly transition of business interests upon retirement, death or disability. Our advisors work in partnership with you and fellow business owners to create buy-sell agreements that work for your particular situation.

no one knows your business like you do. but with cotton + allen expert advice you need to grow your business, reduce your tax bu

At Cotton + Allen, our years of experience with privately held businesses help owners manage the challenges unique to their companies. And as a member of the RSM McGladrey Network, we give you access to the privately held business consulting resources of a national organization of more than 6,700 professionals in more than 300 locations.

**innovation. dedication. experience.
the legacy continues.**

Cotton + Allen is a full-service accounting and advisory firm serving the region since 1921. As trusted advisors to our clients, our talents extend beyond traditional tax and accounting work to include a broad range of disciplines that address business and financial needs today and in the future.

Awarded honors for outstanding historic preservation, our business home in downtown Louisville's First Trust Centre is a testament to our firm's legacy.



all in the family

Family-owned businesses face special challenges. Of course there's the emotional component of working with your family members. But there's also extra pressure in terms of multigenerational wealth management planning. Your business is likely to be your largest asset. Ensuring its future requires professional advice.

Cotton + Allen has helped many family businesses ensure their long-term success. Whether through succession planning and implementation, gift and estate tax planning or business advice and counsel, we're here to help your family now – and for generations to come.

**as your trusted advisors, you can count on getting the
burden and preserve what you've worked so hard to build.**

the right services

Cotton + Allen is a full-service accounting and advisory firm. We provide a range of services to meet your needs now and in the future.

audits, reviews + compilations

bookkeeping

budgeting + forecasting

business acquisition + disposition

business advice + planning

business valuation

employee benefit plans

estate + gift tax planning

financial planning + wealth management

information technology consulting

litigation support

outsourcing in accounting + tax

retirement plan design + administration

succession planning

tax planning + strategies

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a member of the rsm mcgladrey network

