



Special Advertising Section

Eisner LLP

Personal Wealth Advisors

Move Beyond the Traditional

Eisner LLP, a premier accounting and business advisory service firm in the Northeast, successfully serves clients by continually anticipating their needs and raising the level of service. Today, business owners, shareholders, chief decision-makers and CEOs are looking beyond traditional tax and auditing services for additional offerings such as succession planning, asset management, investment diversification and estate planning.



Tim Speiss
Partner in Charge, N.J.
Personal Wealth Advisors

"We want to be responsive to the marketplace," says Tim Speiss, Partner-in-Charge of the firm's new Personal Wealth Advisors practice group, which provides tax, financial planning and advisory services to high-net-worth individuals and business owners. "Our clients are sophisticated enough to know their business and personal financial interests need to be aligned."

The service at Eisner is comprehensive, integrated and thoughtful. Organizing and analyzing the individual's financial profile is only part of the service. Setting objectives and priorities, developing a plan design

and alternatives, implementing and monitoring recommendations, and identifying investment managers are attributes that make Eisner distinctive and its results exceptional.

Trusting Relationships, Objective Approach

Eisner, well known as a thought leader for both businesses and individuals, creates strong, long-term relationships. "We help our clients drill deeper than just their personal financial situation," says Senior Manager Dan Yu. "We listen, we educate, and we customize a broad, encompassing plan design. But this is just the beginning. By helping clients implement their plan and then monitoring and reviewing it with them on a quarterly basis, we guide our clients every step of the way."

For example, recently a corporate executive decided to take an early retirement package. His objectives were to relocate from New Jersey, purchase a new home and explore the options of teaching and philanthropy. Eisner advisors helped the client determine that his assets were



Dan Yu
Senior Manager, N.J.

sufficient to retire and fund an active lifestyle. In addition, advisors reviewed his corporate compensation and benefit plans, constructed a long-term cash flow and balance sheet forecast analysis, created a comprehensive asset allocation model, and prepared the client's 2006 income tax projection. Eisner also monitors the performance of his investments on an ongoing basis.



Carolyn Dold
Tax Partner, N.J.

What sets Eisner apart from other firms is its objectivity and highly qualified team of advisors, who possess unparalleled experience, knowledge and accessibility. "We are on the pulse and trends of the marketplace, not just existing law or history," says Tax Partner Carolyn Dold.

In another example, an Eisner client sought assistance with issues related to business succession utilizing a limited liability company. Eisner advisors reviewed the LLC business plan, balance sheet and valuation assumptions, as well as the client's estate plan. Additional analysis included determination of annual cash flow, recommendations for transferring the LLC ownership to a family member, discussion of emerging tax legislation, evaluation of risk management exposures and asset allocation mapping. Eisner is currently assisting the client with the implementation of these recommendations.

With offices in New Jersey, New York and Long Island, Eisner serves companies and clients worldwide through its affiliation with Baker Tilly International.

Eisner

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