

Big firm capability. Small firm personality.

# THE BONADIO GROUP

CPAs, Consultants & More

## Your Success & More.

Exceeding Expectations.  
Delivering Results.

877.917.3077 | [bonadio.com](http://bonadio.com) |    

Albany | Buffalo | Dallas | East Aurora | New York City |  
Rochester | Rutland | Syracuse | Utica | Virginia Beach



Accounting & Financial Women's Alliance





# **Problem Solvers. Industry Experts. Trusted Partners.**

## **Our Story**

Founded in 1978 and led by active and engaged problem solvers, we bring a unique passion and approach to our work. For 40 years and counting, we have been listening to our clients and partnering with them to create solutions that address their financial and business challenges.

As a top 50 CPA firm, our clients look to us as trusted, strategic, community-oriented partners who have a deep knowledge of their business and priorities. Your success is the foundation for everything we do, for both our clients and in the communities they live.

## **Industry-Leading Ideas**

Combining technical expertise with a keen understanding of our client's businesses, we offer knowledgeable insights and advice on a broad spectrum of industry trends through written articles, in-person seminars, webinars, thought leadership & more.

## **An International Presence**

Reach beyond national borders into a global market. The Bonadio Group is an independent member firm of the Moore North America, Inc. Association, which is itself a regional member of Moore Global Network Limited.

# What Sets Us Apart From the Rest

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01

## Services Tailored to Your Needs

To ensure that we are on the cutting-edge of best practices across our industry, we dedicate substantial resources to training, technology and continuing education that clearly separate us from the rest.

02

## Powered By Our People

Our bench strength of talent is one of the deepest in our industry. Our people thrive on meeting challenges. Their expertise, energy and passion mean our clients get results delivered by people who take pride in a job well done.

03

## Dynamic Company Culture

We offer a dynamic workplace that cultivates enthusiastic team members and a diverse collection of perspectives. We're problem solvers, difference makers and forward thinkers - we don't just dream of the future, we create it, and find solutions that benefit the clients and communities we serve.

04

## Excellence in Everything We Do

For more than 40 years, we've developed a level of expertise in a broad spectrum of industries and markets. Our deep understanding and professional insights bring unparalleled expertise & more to organizations who expect nothing less than excellence.

# What We Do

- 01 Assurance
- 02 Tax
- 03 Small Business Advisory
- 04 Advisory & Consulting



**We deliver a full spectrum of services curated to meet your unique needs. We always go the extra mile and embrace a forward-thinking approach in developing unique solutions that solve our clients' toughest business challenges.**

### **Assurance**

Our team of trusted assurance experts work to keep you moving forward with the critical information you need to make informed decisions. Your Bonadio team turns a typical engagement into a powerful business performance opportunity by helping you understand, address and control risk.

### **Tax**

Keep more of the money you earn by taking advantage of all the tax-savings opportunities available to you and your business. Whether it's reducing your individual tax burden or applying for tax credits and incentives for your company, experienced strategic and technical guidance can save you money.

### **Small Business Advisory**

We understand the pressures you face in small business. Tax laws change. Cost pressures intensify. And, sooner or later, your succession plan weighs on you. Your Bonadio team has the experience and expertise to keep you on track today and prepare for the future.

### **Advisory & Consulting**

Strategy that drives business performance. Our comprehensive consulting services keep you well-equipped to drive your business forward despite any challenges you face. Our clients look to us as trusted, strategic partners who have a deep knowledge of their business and their priorities. Think of us as an extension of your team.

# Who We Serve

- 01 Construction & Real Estate
- 02 Financial Services
- 03 Healthcare Services
- 04 Human Services
- 05 Manufacturing & Distribution
- 06 Private Wealth
- 07 Public Sector & Not-for-Profit
- 08 Service Providers



Our experts are not just well versed in technical audit and tax matters, but also in issues specific to our clients' organizations. By diving deep into each industry, we bring more contextual understanding to each engagement.

### **Construction & Real Estate**

We provide value by applying our industry knowledge and experience through the delivery of thought leadership, tax strategies, operational observations, awareness of economic incentives, and quality service. We also specialize in a full spectrum of consulting services that construction and real estate company owners and management need to help them succeed and grow.

### **Financial Services**

We excel in providing innovative services and strategic planning to banks, credit unions, finance organizations & more.

### **Healthcare Services**

Working with thousands of healthcare organizations through the years, we serve as integral partners of their business teams.

### **Human Services**

We are dedicated to serving tax-exempt organizations, providing a customized mix of assurance, tax and consulting services to help keep you in compliance and focused on the tasks at hand.

### **Manufacturing & Distribution**

Diverse clients mean diverse solutions. We have all the tools necessary for you to achieve success.

### **Private Wealth**

We offer an extensive variety of accounting, management, and advisory services to help individuals, their families, and related entities to meet their financial goals and protect their assets. Working as your trusted advisor, we can reduce the stress associated with everything from complicated tax and estate issues to paying your bills.

### **Public Sector & Not-for-Profit**

Public Sector and Not-For-Profit clients face similar challenges of fiscal accountability and compliance in demanding and rapidly changing business environments. Bonadio experts routinely provide proven and innovative solutions to even the most diverse and complex challenges. From the initial meeting to engagement completion, our & More service structure ensures that each client receives our full attention.

### **Service Providers**

We embrace a forward-thinking approach in developing unique solutions that solve your toughest business challenges.



**Extensive  
Resources.  
Local Roots.  
Personal  
Commitment.**

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## **Bonadio on the Map**

With offices spanning New York State, Vermont, and Texas, there's sure to be a Bonadio office that can meet your needs. Even though we are a Top 50 national accounting firm, we never lose sight of the fact that, at our core, we're a local firm.

For us, "big firm capability, small firm personality" means we have a comprehensive suite of services that are delivered by people who know and care about each client and the community in which they live.



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## Albany, NY

6 Wembley Ct.,  
Albany, NY 12205

## Buffalo, NY

100 Corporate Parkway, Suite 200  
Amherst, NY 14226

## Dallas, TX

7557 Rambler Road, Suite 600  
Dallas, TX 75231

## East Aurora, NY

100 Riley Street  
East Aurora, NY 14052

## New York City

1040 Avenue of the Americas, 3rd Floor  
New York, NY 10018

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## Rochester, NY

171 Sully's Trail  
Pittsford, NY 14534

## Rutland, VT

135 North Main Street, Suite #10  
Rutland, VT 05701

## Syracuse, NY

432 North Franklin Street #60  
Syracuse, NY 13204

## Utica, NY

7936 Seneca Turnpike  
Clinton, NY 13323

## Virginia Beach, VA

301 Bendix Road  
Virginia Beach, VA 23452



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## Serving Clients Nationwide

We bring an integrated world of resources to every client, large or small. We have developed relationships with a diverse range of organizations across the country, which means you benefit from unparalleled expertise and perspective.

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