Transactional Services



IMPROVE YOUR FINANCIAL SUCCESS WITH OUR PROACTIVE GUIDANCE

For decades, we help businesses across Greater Boston, New England, and beyond make smart decisions that boost profitability and long-term success. Our experienced professionals identify underperforming areas and partner with management to implement practical strategies for growth. To deliver even greater value, we offer specialized solutions that support every stage of your business journey.

OUTSOURCED FINANCE & ACCOUNTING ADVISORY SERVICES

We provide expert oversight and strategic planning to streamline operations, improve cash flow, and guide complex decisions.

Services include:

- Strategic financial oversight
- Financial reporting and analysis
- Cost accounting
- Process improvement
- Due diligence expertise
- Streamlined and stabilized financial operations
- Working capital analysis
- Acting as a key liaison

TRANSACTIONAL SERVICES

We deliver comprehensive solutions that maximize deal value and minimize risk—from tax structure consulting to integration and exit strategy planning.

Services include:

- Tax structure consulting and analysis
- Working capital targeting
- EBITDA analysis and adjustments
- Integration services
- Tax consulting
- Exit strategy planning

QUALITY OF EARNINGS

We provide clarity and confidence in your transaction through in-depth analysis and due diligence expertise.

MEET THE TEAM

Patrick Bevington

Bradley Dumais

Stephen Hearn

John Herrick

David Marroncelli

Karina Tomlinson

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Services include:

- Buy-side Quality of Earnings
- Sell-side Quality of Earnings
- Financial, tax and accounting due diligence
- Earnings normalization and adjustments
- Working capital analysis and targeting
- Transaction readiness and pre-sale planning
- Support for lenders, investors, and private equity groups

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