

Food & Beverage Industry Practice

Sensiba San Filippo's (SSF) Food & Beverage practice serves companies from start-up's to global firms in the agribusiness and the food and beverage industries. Our practice includes manufacturers and distributors, food growers, vineyards and wineries, restaurant franchisors and equipment manufacturers serving the food and beverage industry.

With a deep understanding of the nuances and challenges facing companies in the Food and Beverage industry, the SSF team provides guidance and technical expertise to our clients on accounting, tax and operational issues.

REPRESENTATIVE COMPANIES SERVED

- Alive and Radiant Foods
- Anton Caratan & Son
- Caffè Roma Roasting Co.
- Gimbal Fine Candies
- HMC Farms
- Markstein Sales Co.
- MTC Restaurant Group
- Pandol Brothers, Inc.
- Peco Controls Corporation
- Sukhi's Gourmet Indian Foods
- Terra Nova Trading
- Weibel Vineyards
- Wisoman Foods
- Zoria Farms

ABOUT SENSIBA SAN FILIPPO

SSF is a leading regional accounting, tax and business-consulting firm focused on providing superior service and expertise to clients throughout Northern California. Our firm has the nimbleness of a boutique-consulting firm, the deep expertise based on over 35 years experience, and a sophisticated client service approach. Our firm includes 18 partners and approximately 120 additional professionals. We have six offices across the Bay Area to serve our clients from including Pleasanton, San Mateo, San Jose, Morgan Hill, Oakland and San Francisco.

In addition, SSF is a member of KS International (www.ksi.org), a global network of regional accounting firms, with presence in over 60 countries. KSI was formed to help its members better serve the global needs of their clients engaging in international business transactions by providing an international resource for accounting, consulting and taxation services as well as referrals to local service providers.



Karen J. Burns
Food & Beverage
Industry Practice Leader

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Karen is an Assurance Partner with Sensiba San Filippo (SSF) and leads our Food and Beverage industry practice. She has over twenty-five years of experience providing financial and business consulting services to companies in the manufacturing sector. As Food & Beverage is a cornerstone industry in the Bay Area, Karen has a wealth of experience in identifying opportunities, challenges, and trends.

Recognized as a Food & Beverage (F&B) industry expert, Karen's work, commitment and passion for the ever-changing landscape makes her uniquely qualified to share insights to rapidly growing F&B companies, ranging from start-ups to multigenerational family businesses.

Karen identifies financial and tax opportunities that are consistently under-leveraged by Food & Beverage companies, such as Enterprise Zone credits, research and development credits, derivative use and international accounting solutions. Such information is essential for companies to enhance growth, manage risk and supplement their bottom line.

Karen's involvement in the F&B community enables her to identify and share trends in the sector including organic and natural food, ethnic cuisine, Venture investment, and the increasing importance of building a "Green" brand. Both local industry groups, as well as national publications such as Bloomberg BusinessWeek, seek her perspective.

SSF SERVICES

Assurance, Advisory & Review

The SSF Assurance team provides Financial Statement compilations, audits and reviews for the benefit of company management as well as to provide the reliable, standardized, accurate reports to interested stakeholders — its creditors, investors, vendors, or even potential acquirers. Our professional's will help you to prepare and proactively anticipate what vendors will need as they assess your company, and to best prepare in response to any questions or feedback.

Tax Planning & Compliance

SSF's tax team arms clients with the tax knowledge and analysis to both manage risk and leverage opportunities best suited for their business to prosper. Our active involvement in KS International provides access to local tax and business practices in over 60 countries across the globe. The team provides comprehensive tax planning and compliance services, including all preparation and filing requirements, and procurement of applicable tax credits.

Business Services

SSF's Business Services team helps businesses of all sizes produce timely, meaningful financial statements providing substantive and accurate information for decision making. The improved process and timeliness achieved through working with our Business Services team may also help reduce the costs of an annual financial statement review or audit. Services include:

- Periodic financial statement compilation / preparation
- In-house close assistance, process development and standardization
- QuickBooks training / bookkeeping services
- Fixed asset / depreciation projects
- Accounting training
- Account reconciliations
- Chart of accounts setup and / or review

Business Process Assurance

Our Business Process Assurance Group assists clients in increasing the reliability and consistency of information produced by their business processes and IT systems. Our practice assists companies in establishing processes and controls necessary for assurance of information reported to both internal and external stakeholders.

- SSAE 16 (SOC 1)
- SOC 2 & 3
- WebTrust
- HIPAA Compliance
- ISO 27001 Compliance

Mergers & Acquisitions

As a leading accounting firm, SSF is well-versed in the intricacies of M&A transactions - whether clients are looking for a successful buyout or to prepare for an acquisition, SSF can advise you through the process ensuring that decisions are made with your best interests in mind. Services include:

- Business plan preparation
- Tax planning
- NOL leverage / planning
- Recasting historical financial statements
- ESOP consultation and planning
- Exit strategy development and implementation
- Offer evaluation
- Team selection
- Transaction negotiation
- Due diligence / Target assessment

OUR TEAM TO SERVE YOUR NEEDS



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