

**EDELHEIT &  
EDELHEIT, LTD.**  
CERTIFIED PUBLIC ACCOUNTANTS  
BUSINESS & PERSONAL CONSULTANTS

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**SPECIALIZED ACCOUNTING, CONSULTING  
& ADVISORY SERVICES FOR INSURANCE AGENCIES**

At Edelheit & Edelheit, we have a real passion for working with insurance agencies and their owners — and a proven ability to provide solutions that address their special needs. Our comprehensive accounting and advisory services are designed to:

- 1) Minimize tax liability and maximize profitability
- 2) Evaluate and strengthen your internal controls
- 3) Ensure your agency accounting is effective, accurate, and compliant
- 4) Help you plan for your agency's future – perpetuation planning
- 5) Achieve your financial goals

Our firm is one of only a handful in the Midwest with concentrated experience in insurance agency accounting and consulting. In the Chicago area, nearly 25 agencies — small and large — call on us for attentive, effective services that include:

- Agency compliance reviews
- Profit enhancement
- Entity structure advice
- Tax preparation and consulting
- Perpetuation planning
- Forensic Accounting
- Mergers, acquisitions, and due diligence
- Audit/review/compilation services
- Agency valuations

**Expertise you can rely on**

Since our founding in 1977, we have helped hundreds of clients maximize their profitability and minimize their tax obligations. Our unwavering dedication to our clients has enabled us to build a reputation as enthusiastic, highly responsive industry consultants who have a “business owner” mentality and are especially knowledgeable in proprietary insurance agency software packages. We are also associate members of PIIAI.

Most important, our deep understanding of the insurance industry enables us to speak your language and offer advice based on extensive experience and proven best practices.

**Contact us**

We would welcome the opportunity to discuss your needs and explain how we can help you and your agency reach new levels of success. Please contact one of our partners today and let us know how we can be of service:

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