



Portfolio

company

services

Private Equity

#### Pathways to performance

With the right guidance and experience, you can realize the full value of your portfolio. Wipfli's private equity specialists help your portfolio achieve growth, boost business performance, increase EBITDA and balance compliance.

Gain strategic ideas and solutions from a wide range of areas. Whether it's through tax optimization, performance alignment or operational excellence, Wipfli helps you successfully address portfolio company challenges and grow in today's fast-moving environment.

#### It's all about leverage

For more than 85 years, Wipfli has helped organizations manage and enhance performance. Our deep industry specialization allows us to combine the strength of our audit and accounting, tax, technology consulting and business advisory services — creating a well-rounded team of true specialists.

Leverage our smart strategies and proven solutions to make data-driven decisions. Wipfli works closely with you to understand your needs, while also working directly with your portfolio companies to enact the right kind of changes that pave the way for growth. With our team, you can increase revenue, decrease costs, mitigate risks and enhance earnings.

Realize results and returns with **smart, technology-enabled strategies.**

**WIPFLI**

# Create value for strong and sustainable investments

With Wipfli on your side, your team can focus on your strengths while we take care of the rest. Our portfolio company services include:

## Consulting and advisory

The private equity space has unique needs when it comes to third-party advisory solutions, and Wipfli provides the specialized experience to best serve your firm. We provide a wide range of portfolio company services, from valuations to business integrations, intelligence tools to internet of things (IoT) systems, and change management to cybersecurity.

## Technology consulting

Technology solutions provide critical information that allows leaders to make faster, data-driven decisions. Wipfli can help you select and implement the software to best meet your organization's needs. From the dashboards and KPIs of a business intelligence solution, to the integrated business objectives of a CRM or ERP solution, technology can power your business's future success.

## Outsourced services

From day-to-day bookkeeping to complex analysis, meet your accounting needs with Wipfli's outsourced financial services. We provide personnel resources, including CFO-level assistance; financial accounting outsourcing (FAO), where you benefit from a complete back-office team; technology managed services, where we help manage your technology environment; and managed detection and response, which combines technology and human expertise to protect your organization from cyber threats.

## Talent management

Navigating people-centered change and optimizing talent can be the driving forces in an organization's success — or its failure. Wipfli delivers talent optimization and change management solutions that deliver bottom-line results — from culture, performance and management assessments to the power of the Predictive Index®.

## Audit and accounting services

Whether you need an opening balance sheet audit or you're looking to comply with regulations, Wipfli is the firm to rely on. Our audit and accounting specialists are deeply experienced and knowledgeable. Use our team for: audits, reviews and compilations; acquisition accounting; lease accounting; ASC 606 revenue recognition readiness assessments, planning and implementations; working capital analyses; inventory observations; share-based compensation arrangements (ASC 718) and more.

## Tax services

We provide a range of tax services to help your firm save and grow. Services include: post-transaction tax integration; international, federal, and state and local tax consulting and compliance; tax-minimization strategies; add-on acquisition structure planning; sell-side tax due diligence services to identify tax exposure prior to a divestiture; and tax planning and analysis of the divestiture of a portfolio company.

## Let's get started

Contact Wipfli to learn more about how our portfolio company services can help you realize greater value.

[wipfli.com/PrivateEquity](https://wipfli.com/PrivateEquity)