

## MISSION

At CRR, our mission is simple: to assist our clients in navigating through their business and personal lives.

## CULTURE

We believe in treating people the way we would like to be treated, which means we are committed to getting back to you as quickly as possible and providing the expert guidance you need to solve your financial challenges.

## LEADERSHIP

CRR's office is staffed by a team of 32 professionals, located in Wakefield, MA, and led by 4 partners:

## INDUSTRIES

- Construction
- Distribution
- Gaming
- Life Sciences
- Manufacturing
- Non-Profit
- Professional Services
- Real Estate
- Recreation
- Technology



**David J. Richards** CPA, MST  
MANAGING PARTNER



**John F. Rizzo** CPA  
PARTNER



**Keith Blankenship** CPA  
PARTNER



**Richard Daigle** CPA  
PARTNER

### TAX, AUDIT + ACCOUNTING SERVICES

- Federal and multi-state tax planning + preparation to minimize liability
- Analysis of new tax laws + regulatory impact
- Representation before IRS and other agencies
- Financial statement audits, reviews + compilations
- Employee benefit plan audits + consulting
- Internal controls

### TRANSACTION ADVISORY + BUSINESS VALUATION

- Determine the true value of your business enterprise
- Create an exit strategy for your business
- Preliminary negotiations
- Letter of intent
- Due diligence
- Definitive agreement
- Closing support
- Post-closing adjustments + true-ups

### PRIVATE CLIENT SERVICES

- Income tax planning + consulting
- Estate + wealth succession planning
- Estate, gift + trust consulting + compliance
- Charitable giving + philanthropic foundations
- Family office services

### CLIENT ACCOUNTING + ADVISORY

- Bookkeeping services - partial to full
- Accounting department support
- Fractional controller
- CFO level support
- Accounting analysis + benchmarking