

Government Contracting Services



Statement of Qualifications

Prepared by:

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“Providing innovative solutions resulting in the financial success of our Clients, Staff and Firm.”



Introduction

MARTINEZ & ASSOCIATES CPAs is a full service accounting and business advisory firm with a focus in the government contracting industry. Through our in-depth knowledge of the government contracting industry, we can guide organizations like yours through the various challenges and opportunities inherent with government contracts. One of our primary objectives is to help our clients maximize profits and minimize tax liabilities. We strongly believe that this presentation will demonstrate how we can help organizations like yours succeed in a way that no other firm can.

We have found that most firms lack in identifying the main objectives of their clients regarding the need for outside CPA services. The industry knowledge we have acquired over the years serving organizations like yours has enabled us to develop a thorough understanding of the distinctive needs of organizations doing business in the government contracting industry that makes our Firm the most qualified to meet your needs.

Martinez & Associates CPAs strives to provide services to our clients to meet their goals and expectations. One way we provide such services is to partner with various organizations that may benefit our clients. We leverage these relationships combined with our industry knowledge to provide services above and beyond the standard accounting and tax services traditionally provided by other accounting firms. Ultimately, the key to our success is our people and their willing commitment to accomplish these goals. You will find this presentation has a simple purpose—to share the values and qualifications of our firm and to reinforce the value of our firm to your organization.

Firm Background and History

The Firm of Martinez & Associates CPAs represents a longstanding history of client service Central Florida. Located in Winter Springs, our has been serving clients for over forty years. Over past decade Martinez & Associates CPAs has been consistently ranked in the top twenty-five among the accounting firms in Central Florida by the Orlando Business Journal. Our partners and managers many years of experience with local, regional and national firms focused on serving organizations like yours.

Our management group is broadly experienced, highly involved and totally committed to client service. Your organization will get their full personal attention, along with the complete resources of the Firm.



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A feature unique to our Firm is the regular involvement of senior professionals in your work. The ratio of “partner/manager to staff” is much higher than in most other firms. The continued benefit to our clients is that senior and experienced professionals address non-routine issues allowing for a greater level of expertise in dealing with significant matters.

We value our relationships built with each client. These bonds are built on integrity and trust above all else. As such, we value our client’s needs, goals and values as our own and realize they are the key to long-term personal and professional success.

Our Firm is a member of both the American Institute of Certified Public Accountants (AICPA) and the Florida Institute of Certified Public Accountants (FICPA). Our personnel have served on and chaired multiple committees at various both a financial and advisory capacity. Furthermore, to ensure our Firm stays abreast of the government contracting industry we maintain active membership with both the National Center for Simulation and National Defense Industrial Association.



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Staff Qualifications and Development

Martinez & Associates CPAs has professionals at the partner, manager, senior and staff levels. Each of the Firm’s professionals has been selected through a rigorous process, including multiple personal interviews and reference checks, to help ensure that the Firm employs the most highly qualified personnel.

The Firm has a professional development plan for each of its employees, which is updated annually during evaluation sessions with the Managing Partner. In addition, each professional is required to attend at forty (40) hours of continuing professional education annually. The also monitors compliance with the continuing professional education other licensure requirements of the Florida Board of Accountancy for all certified public accountants.



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Peer Review

Martinez & Associates CPAs participates in the peer review program sponsored by the AICPA. A review consists of an examination of Firm's quality control system by an independent CPA and includes a review of the Firm's operating procedures, interviews with selected Firm personnel to ascertain that understand their roles in the Firm's quality control system, a review of continuing education records to ascertain compliance and reviews of financial statements and engagement files for all levels of service, including financial statement audits.



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A peer review is required to be performed once every three years. The Firm's most recent peer review conducted in 2019 resulted in an unqualified report with no letter of comments, which is the highest grade a firm can receive. This underscores the Firm's continuing commitment to overall quality.

Our Approach

Experience has taught us that choosing an accounting firm is a significant decision, not arrived at lightly, nor to be undertaken without knowing what can be expected from your accountants seeing as the decision can have a major impact on the organization's future success.

Several key aspects of our Firm set us apart:

- ❖ High degree of partner, manager and supervisor interaction and involvement with each client ensuring clients always receive the highest level of service.
- ❖ Industry knowledge and experience acquired over the course of fifteen years serving clients in the government contracting industry.
- ❖ Trustworthy accountants and business advisors passionate about securing our clients' financial future.

Our team is comprised of exceptional CPAs, accountants and business minded individuals. We pride ourselves in the fact that we are not just great accountants, but also great business people.



Your organization deserves a properly leveraged team of CPAs and business advisors in order to receive a high level of service and maintain fees at an appropriate level. The individuals assigned to each of our client projects is as follows:

Client Partner - will have complete responsibility for all work performed. Will participate in planning, attend client meetings and review all significant accounting issues with the client service team to ensure our Firm provides the highest level of service.

Client Manager - will maintain continuing contact with the client team through a review of working files, supervision of staff accountants and meetings with client personnel. In addition, will be responsible for working with the client partner and in the overall administration of the client project to ensure the client's expectations are always met.

Client Staff - will be responsible performing accounting services under the direct supervision of the client partner and manager. Monitoring by the client partner and manager ensure all client projects performed at the highest level of quality and all projects are executed efficiently and accurately guaranteeing the overall satisfaction our client and their experience with Martinez & Associates CPAs.



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Planning

The planning phase of a client project establishes a proper foundation for the direction of the project and for coordination with client management ensuring the client's expectations are met. Our planning is accomplished through:

- ❖ Meeting with client management and staff to communicate expectations and develop a solid rapport.
- ❖ Obtaining an understanding of the client's business including the types of government contracts they have entered into in order to determine how the client's contracts, overall operations and accounting system integrate. Our main objective during this knowledge gathering process is to enable us to provide valuable recommendations to our clients which may represent opportunities for strengthening their internal controls and operating efficiency.

Reporting

At the completion of our accounting services, we will schedule a meeting with client management and furnish formal reports highlighting our clients financial results. We also use this to provide any feedback and recommendations to client management which may help further improve their operations. Lastly, we use this time to allow our client's to communicate with us and provide us with feedback to ensure they are receiving the highest level of service and also to ensure their expectations are being met.



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Services

Martinez & Associates CPAs motto is “providing innovative solutions resulting in the financial success of our clients, staff and firm”. We pride ourselves with providing services specifically tailored to the individual specific needs of each of our clients. Below is a list of a few of the services we provide for our clients in the government contracting industry.

- ❖ Financial statement audits
- ❖ Reviews and compilations
- ❖ Tax planning and compliance
- ❖ Outsourced accounting services
- ❖ CAS and FAR compliance
- ❖ Incurred cost submissions
- ❖ Indirect rate calculations
- ❖ Cost proposal support
- ❖ DCAA audit support
- ❖ Employee benefit plan services
- ❖ Accounting system training and assessment



Furthermore, Martinez & Associates CPAs is a full service accounting firm offering a complete spectrum of accounting related and professional services. At Martinez & Associates CPAs we like to view ourselves as not only our client's



accountants but also their business advisors. As trusted business advisors our client's come to us first whenever a need for professional services arises. We came to realize that traditionally organizations' multiple business advisors do not communicate with each other resulting in inefficiencies and overlapping services and consequently not always making sound business decisions. As a response our firm over the years has established a group of trusted professional business and service advisors which share our unparalleled commitment to excellence and client service. This open communication between all advisors allows us to adequately perform tax planning and implement tax strategies for our clients ensuring they minimize their tax liability and maximize profits. All in all, our clients are able to obtain all of their professional service needs under one roof providing great levels of efficiencies for them.

Industry Experience

We realize that the government contracting industry is extremely specialized and requires a unique understanding of the applicable accounting principles, tax laws and regulatory issues. These can only be understood and applied by well-earned experience.

Martinez & Associates CPAs has acquired in-depth experience in the government contracting industry through serving various clients in industry over the past fifteen years. the years our firm has established a niche expertise within the industry



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has helped set us apart from other firms. To ensure we can provide our clients with up to date advice our firm is active in government contracting associations ensuring we are abreast of all of the latest industry developments that may effect our clients. In addition, our staff actively monitors the Federal Acquisition Regulation (FAR), Cost Accounting Standards Board (CASB) and Defense Contractor Audit Agency (DCAA) agendas ensuring our staff are up to date with the latest regulations and our clients are in compliance. Personal references and testimonials can be furnished upon request.

Benefits of adding Martinez & Associates CPAs As Part Of Your Team:

In your decision making process please consider the following benefits of making Martinez & Associates CPAs your accountants and trusted business advisors:

- ❖ Over forty years of experience servicing the Central Florida community.
- ❖ Over fifteen years of experience in the government contracting industry.
- ❖ Commitment to excellence and providing our clients with the highest level of service possible.
- ❖ Passionate about securing our clients' financial future. Serving our clients interest is truly our top priority.
- ❖ Our team stays abreast of the ever changing government contracting industry providing you with up to date advice and ensuring that your organization is in compliance with the multitude of regulatory issues.
- ❖ Partner, manager, supervisor and staff assigned to your project will be involved from the start to finish.
- ❖ Our team maintains year round contact with all of our clients regardless of the project duration ensuring timely and effective communication which leads to sound business decisions.
- ❖ Our firm provides a concierge service for all other business needs (at no charge to our clients).
- ❖ Regular news letters to help you and your staff stay informed about compliance issues as they arise.
- ❖ Our firm hosts executive roundtables with other business professionals and organizations directly involved in the government contracting industry to meet, interact and share ideas that we can pass along to our clients...our "learning together" program.



In conclusion, our desire is to become your organizations accountants and trusted business advisors. We are confident once we gain your trust we will never have to ask for it again. Our main objective in serving your organization is to help your organization successfully accomplish its mission and goals. Martinez & Associates CPAs is certain that your organization will find our services to be of great value and we look forward to working with your organization.