

OUR MISSION

Simons Bitzer & Associates is a local CPA firm established in 1995. We work with organizations, business owners and their teams to help them achieve their goals by improving efficiencies and maximizing their profitability.



TESTIMONIALS

“As a client of Simons Bitzer for many years, we’ve found them to be a valuable extension of our own company. They keep us informed, current and most importantly, compliant in business and accounting services. Working with Simons Bitzer has been convenient, cost-effective, and one of the best business decisions we’ve ever made.”

~ Stacey Cain, Partner, Burkhart Cain Associates, Inc.

“Simons Bitzer has been a valuable business partner with Goodwill Industries and has grown with it for nearly 10 years. Simons Bitzer is always responsive to Goodwill's needs, flexible, and ready with a sound observation or helpful recommendation to make business processes better. Goodwill looks forward to continuing its partnership with Simons Bitzer.”

~ Dan Riley, Vice President, Goodwill Industries, Inc.

“The staff of Simons Bitzer is intimately involved with our agency and understands the needs of a non-profit agency such as ours. We have found their services to be a cost-effective way of having quality financial services without the overhead cost of employing a bookkeeper and/or an accountant. Dayspring Center is very pleased with the services offered by Simons Bitzer and consider them an integral part of our team.”

~ Lori Casson, Executive Director, Dayspring Center, Inc.

LEVELS OF SERVICE

CFO/Strategic Partner Level

- Strategic and General Business Planning
- Business Diagnostics and Performance Improvement
- Assistance with Implementation of Business Plan
- Customer and Team Advisory Boards
- Bank Relationship Management
- Key Performance Indicators/S.W.O.T. Analysis
- Strategic and Long Term Planning Meetings
- Systems Development and Implementation

Controllership Level

- Reviews, Compilations, and Write-ups
- Monthly and Quarterly Bookkeeping Services
- Preparation of Monthly and Quarterly Financial Reports
- Cash Flow Planning and Monitoring
- Preparation of Annual Financial Forecasts
- Preparation for Annual Audits
- Systems Analysis and Internal Audit Services
- Financial Data Summarized by Industry Sector

Compliance Level

- Preparation of Quarterly Compiled Financial Statements
- QuickBooks Setup, Implementation, Training, Support
- Assistance with Setup of Business Entities
- Preparation of Payroll, Property Tax and Sales Tax Reports
- Preparation of Business and Individual Tax Returns
- Tax Planning and Quarterly Estimated Tax Calculations



SIMONS BITZER

CPAs & STRATEGIC
BUSINESS ADVISORS

Simons Bitzer & Associates, PC
8350 S. Emerson Avenue, Suite 100
Indianapolis, Indiana 46237
Phone: (317) 782-3070
www.SimonsBitzer.com

We're passionate about your

Success!

OUR UNIQUE PROCESS

For Your Customized Solutions

At Simons Bitzer & Associates, we take a unique and specific approach to all of the services we provide, from entire strategic business plans to personal tax planning projects. Our approach consists of four important steps: Strategize, Plan, Implement, and Monitor, or what we refer to as SPIM. Using this approach, we are able to ensure that the services provided are precisely as intended with the results achieved in a timely manner and according to plan. We also monitor the progress to determine the success of each action taken.

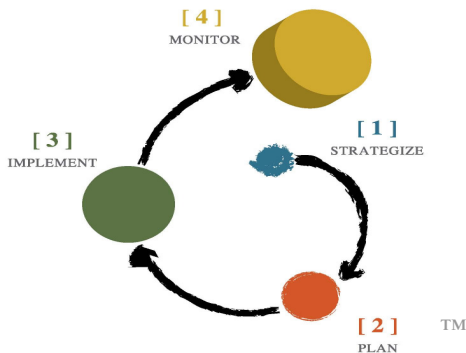
The SPIM approach was designed to improve the processes and profitability of a business and to help ensure that your personal financial goals are achieved.

Strategize

Plan

Implement

Monitor



a Q&A

with Simons Bitzer & Associates

OUR UNIQUE DIFFERENCE

Simons Bitzer & Associates is unique in many ways, such as our SPIM process. Another is the exceptional personal attention and service that we bring to each customer.

Can you describe a common challenge facing your customers today?

Business owners and leaders often recognize that there are areas of their businesses that need improvement but day-to-day responsibilities have a habit of getting in the way of identifying them. They spend their time working IN their business rather than conducting activities necessary to GROW their business.

How can Simons Bitzer help?

It is critical for businesses to have someone thinking about the finances and analyzing the financial results of the business. Some owners may find they need a full time financial professional, one for just a couple days a week, or one for only a few hours a month. Whatever the situation, we offer a wide range of CFO/Controllership services to fit any financial need.

When does a customer typically contact your firm for assistance?

When our customers went into business for themselves, it is likely they had dreams for both their business and their lifestyle. The business consulting and accounting services we offer are designed to make sure they achieve those dreams. We have found that our customers contact us when there is a gap between where they are currently and where they want to be.

How are you different from other public accounting firms?

Over the past 15 years, we have implemented cutting-edge solutions that allow leaders to effectively identify issues critical to their business. Our aim is simple and unchanged. Our consulting services offer increased revenue opportunities as well as the ability to create a sustainable competitive advantage in the marketplace.

Why do customers generally engage your firm?

We serve customers in a variety of industries including, but not limited to, manufacturing, distribution, construction, transportation, healthcare, service providers, and non-profit agencies. Some of our customers engaged us because they were frustrated, quite frankly, that they were not receiving adequate financial information on a timely basis leading them to be concerned about their ability to manage their cash flow. Others have hired us because they were surprised at the last moment by how much taxes they or their company owed.

Do you offer tax planning and preparation services?

Yes. It is important to save our customers time, money and worry when it comes to taxation. We have experts in both individual and business tax. We are here to help minimize their liability, remind them of important deadlines and help them meet all of their federal and state government requirements.

For a complimentary consultation with one of our professionals, please call 782.3070 or visit www.SimonsBitzer.com.