

OUR CLIENT-FOCUSED SERVICE

THE COGENT DIFFERENCE

At Cogent Analytics, we believe your success is our success. We have an abiding passion to place you and your business needs first. We develop and maintain long-term relationships with you, our client, to ensure the processes we develop and implement with you are sustainable and continue to foster your company's growth and profitability. Since 2014, Cogent has been focused on solving the issues business owners face every day. We offer our expertise and create powerful solutions that empower you to lead your business, make better and more timely decisions, increase workforce performance, and improve operational efficiencies. The gratification of assisting a family, and directly, or indirectly, assisting their friends, their neighbors, and a community achieve more than they thought possible is what drives us. Our aim is to build stronger small and medium sized businesses throughout the United States.

Fundamental to our philosophy for your success, we deliver our services based on these guiding principles:

◆ INTEGRITY AND TRANSPARENCY

Our focus on integrity and transparency are key values that set us apart from other firms. We hold our clients in the highest regard and we adhere to a strict, uncompromising code of ethics. The behavior of our people and the quality of our work is unparalleled and speaks to why our clients value our long-term, strategic partnership.

◆ OUR PEOPLE

Our people are the source of our strength and the success of our clients. They provide the experience, passion, and teamwork that are at the very core of our values.

◆ OUR SERVICES

Our services are the tangible measure of our efforts, and they should be the best in serving our clients. We take pride in offering unmatched client-focused service in all that we do.

◆ OUR QUALITY

To exceed client expectations and deliver meaningful solutions; the quality of our work and the services we offer are always our number one priority.

◆ OUR CLIENTS

Our clients are the focus of everything we do. Our work is always done with our clients' needs in front, providing superior individualized services that are second to none.



OUR TAX ANALYSIS

An effective approach toward True Cost Recovery

7 Key Components to Build Cash Flow, Build Wealth and Protect Assets

1 EXIT PLANNING

The one definite in your exit from the business is that the IRS will consider it a taxable event.

Diagnosis — The amount that a business owner ultimately realizes from the exit/sale/or the dissolution of a business will be greatly determined by the proactive exit strategies utilized.

2 RETIREMENT PLANNING

Is your business building the kind of wealth and security that you want for you and your family?

Diagnosis — Business owners can quickly max out “employee” retirement plans. You must capitalize on specific “business owner” benefits to ensure the desired retirement income streams and ultimately the quality of life you will enjoy.

3 EQUITY VALUATION/TRANSFERENCE

Are you looking at options of succession, or exit strategies for your business? Do you wish to sell or pass your business on?

Diagnosis — An accurate, independent business valuation or appraisal is critical when creating succession and exit strategies.

4 ESTATE PLANNING

When was the last time your estate plan thoroughly reviewed and coordinated with your specific goals and objectives?

Diagnosis — Too many business owners have estate plans that fail to coordinate the business, tax, asset protection, and business exit planning. Estate and trust planning is clearly one of the most complex and confusing areas. Any flaw or lack of coordination in your estate plan may result in nearly a 50% reduction in your after tax, accumulated wealth and greatly impact your generational legacy.

5 ASSET PROTECTION

Are your business and personal assets unnecessarily exposed, and therefore making you and your business an attractive target to litigation?

Diagnosis — A well designed strategic tax plan incorporates a well-designed asset protection plan. Establishing the proper entity structure and ensuring the compliance with corporate formalities will ensure your personal and business assets are protected from judgement creditors. Faulty asset protection planning may result in the demise of the business as well as the depletion of the lifelong accumulation of personal wealth.

6 ENTITY STRUCTURING

When was the last time your entity structure was reviewed from a business, tax and legal perspective and revised accordingly?

Diagnosis — Owners of business entities have the opportunity to select a variety of different legal structures. The legal entity structure determines what planning opportunities are available in the areas of: business and personal asset protection; tax savings and cash flow; compensation opportunities; employee retention; succession and business exit strategies; business owner benefits; and as a result — the ability to allow you to build the personal wealth that you should.

7 TAX SAVINGS

What strategies have you considered and implemented to ensure your business and personal taxes are at your fair share, legal minimum?

Diagnosis — A strategic tax plan that is coordinated with your optimal legal entity structure and will ensure you’re paying only the required amount of tax at all levels and will result in increased business and personal cash flow.