

A scenic photograph of a stone arch bridge spanning a calm river. The bridge is constructed from large, dark stones and is surrounded by lush green trees. The water reflects the bridge and the surrounding foliage. The sky is a clear, bright blue.

**Quality Service
is Our Mission.**

**Your Success
is Our Passion.**

Firm Overview

Quality Service is Our Mission. Your Success is Our Passion

At RitzHolman CPAs it's not just what we do, it's how we do it. For over 60 years, we have been an active, vibrant member of the Southeastern Wisconsin community. It is our mission to serve our clients and community with passion, exceptional knowledge, and superior service.

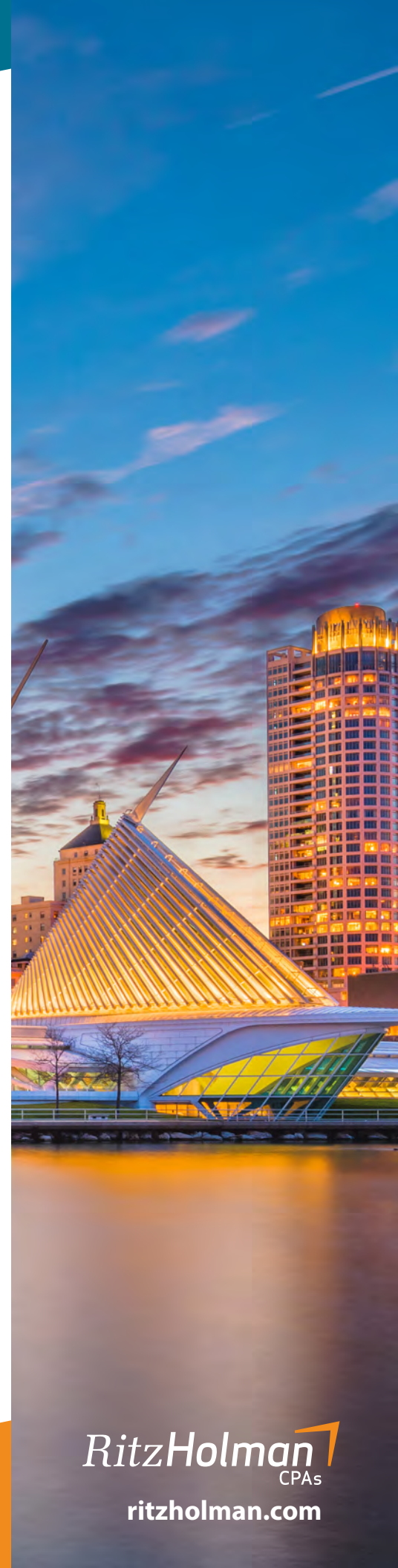
Your best interests always come first at RitzHolman CPAs. As our client, you experience genuine care and hands-on service at every level. We offer a depth of technical and professional experience, in-depth knowledge and resources, and passion for what we do. We pay attention to the details, emphasize accuracy, and prize timeliness.

When you choose to work with us, we treat you like family. The trust and relationships we continue to build keeps our clients coming back for decades, generation after generation.

The RitzHolman CPAs team is your natural resource for:

- Starting a business or nonprofit organization
- Preparing your income tax returns and tax planning
- Receiving audited, reviewed, compiled or prepared financial statements
- Keeping up-to-date with trust and estate tax filings
- 401k or 403b plan audits
- Enhancing your accounting and bookkeeping functions
- Making a career change

RitzHolman CPAs is a natural financial resource that extends far beyond your basic accounting needs. Contact us today!



We Help Businesses Grow

RitzHolman CPAs Business Services Team is dedicated to, and has a long history of, working with and advising closely-held businesses. Whether you are just getting started, or you are at the point of expanding your operations, we are your tax and accounting professionals and so much more.

Our trusted advisors have decades of experience and a wealth of knowledge to share, as the firm has worked with closely-held businesses and owners since it was founded more than 60 years ago.

Our Business Services team is your natural resource that provides:

- Proactive tax planning
- Income tax preparation (C-Corp, S-Corp, Partnerships, LLC)
- Payroll and payroll tax reporting
- Accounting and bookkeeping, from statement preparation to full outsourcing
- Audits, reviews, and compilations
- Financial analysis for business decisions
- Forecasting for expansions and acquisitions
- Employee benefit plans
- Business start-up, including entity choice
- Quickbooks consulting and training

RitzHolman CPAs is the perfect partner for growing your business to its full potential. Contact us today – our team of professionals would love to develop a customized business tax strategy with you.

Darci Middaugh, CPA

darci@ritzholman.com
414-390-1172

Matthew Rios, CPA

matt@ritzholman.com
414-390-1174

Nonprofit Services

We Keep Nonprofits Healthy

Ritz Holman CPAs is passionate about nonprofit accounting. Our Nonprofit Services team provides audit, accounting, and tax services for over 300 organizations. This team of dedicated professionals has a wealth of experience in helping advise and guide nonprofits to long-term financial health and success.

From keeping up with changing tax laws, to maintaining compliance, to generating revenue, you can trust our team to address your organization's unique needs and concerns. Meanwhile, you and your team can stay focused on accomplishing your mission and making the greatest positive impact.

Our Nonprofit Services team is your natural resource that provides:

- Audits, reviews, and compilations
- Federal Single Audits, State Audits, Choice & Charter School, Private Foundations
- Application and tax-exempt status consulting
- Preparation of nonprofit federal and state tax returns
- Private foundation advisory services
- Start-up charity consulting
- Financial operations analysis
- Technical assistance with fiscal policies and procedures
- Board and governance fiscal training
- Accounting and bookkeeping

We would love the opportunity to work with you to grow and maintain the financial health of your nonprofit organization. Contact us today and let's get started!

Diana Luttmann, CPA

diana@ritzholman.com
414-390-1179

Katy Sommer, CPA

katy@ritzholman.com
414-390-1178

Individual, Trust & Estate Services

We Partner With You For A Lifetime

Managing all the decisions involved with taxes, trusts and estates can be overwhelming. We build close relationships with our clients that allow us to develop planning and tax strategies that aim to attain personal goals. We take the time to understand where you are now and provide advisory services that make sense for you.

You can count on RitzHolman CPAs tax team. We have decades of professional knowledge and experience to help you navigate the complexities of individual, trust and estates taxes. Leverage our knowledge and resources to help secure you and your family.

Our Individual, Trust & Estate Services team is your natural resource that provides:

- Proactive tax planning
- Tax preparation
- Tax impact of investment and other financial decisions
- Divorce tax matters
- Elder services
- Private foundations and charitable trusts
- Distribution planning
- Trust, gift and estate tax services
- Annual trust accounting
- Trustee services
- Collaboration with your legal and financial advisors

Contact RitzHolman CPAs! We would appreciate the opportunity to strategically partner with you to create an individualized plan that best protects your family.

Brian Wilson, CPA

brianw@ritzholman.com

414-390-1189

William Mayer, CPA

bill@ritzholman.com

414-390-1171

Outsourcing Services

We are the Natural Resource for Your Business Needs

It takes a lot of hard work, dedication and determination to build a successful business, and with that success comes more complicated accounting and business management needs. RitzHolman CPAs Outsourcing Service team is here to help you through every stage of your business cycle.

When you partner with RitzHolman CPAs, we can manage your cash flow, payroll, taxes, monthly reports, record keeping, and other accounting needs while you focus on achieving all of your business goals.

Our Outsourcing Services team is your natural resource that provides:

- Bookkeeping
- Payroll management
- Accounts payable recording, tracking, and bill payment
- Accounts receivable recording and tracking
- Monthly bank reconciliations
- Sales and use tax reporting
- Year-end tax planning and tax return preparation
- Completion of funding source financial reports
- Financial statement preparation and analysis
- Presentation of financial statements to stakeholders
- Cash flow and budget analysis
- Secure, electronic document retention
- Filing of year-end information returns (Form 1099)
- Monthly, quarterly and annual closing procedures
- Cost allocations
- Audit preparation assistance

Our outsourcing accountants and CPAs look forward to collaborating with you to help your business reach its full potential. Contact us today, and let's get started!

Kelly Goodman

kelly@ritzholman.com
414-390-1184

Katy Sommer, CPA

katy@ritzholman.com
414-390-1178

Matthew Rios, CPA

matt@ritzholman.com
414-390-1174

RitzHolman
CPAs
ritzholman.com

Recruiting

Join the RitzHolman CPAs Team!

As an employee at RitzHolman CPAs, you become part of our family. You have the opportunity to work creatively in a flexible, diverse work environment. You continually develop your skills, knowledge and education, working directly with our partners, teaching others, and making an impact in the community. We believe these are just a few of the reasons we have such strong employee engagement at RitzHolman CPAs.

About Us:

Everything we do focuses on achieving our mission, which would not be accomplished without the talented individuals who make up our RitzHolman CPAs family. Our dedication to achieving our mission makes us a unique and successful firm, and the strength of our firm is defined by our employees.

Our Mission:

To serve our clients and the community with passion, exceptional knowledge and superior service.

Our Passion:

At the core of RitzHolman CPAs is our desire to give back. Sharing our time, talents and enthusiasm strengthens our community and our firm. Employees are encouraged and invited to give back to the community through firm and client events, as well as personal interests in the community.

Employee Benefits:

- Employer funded Health Savings Account (HSA)
- Generous profit sharing contribution
- Competitive compensation
- Employer-provided onsite parking
- Exceptional medical, dental and vision benefits
- Full CPA exam reimbursement
- CPA exam certification bonus
- Client referral bonus
- Employer-provided short-term and long-term disability
- Employer-provided life insurance
- Dependent care and Flexible Spending Account (FSA)
- Generous paid time off program
- Internal coaching program
- Community involvement opportunities

Contact Us!

At RitzHolman CPAs, we leverage each team member's unique skills and talents for his or her role in the accounting process, and that's just one of many things that sets us apart. Think our family is the right fit for you? Contact us today! Please contact Roberta McFarlane Human Resources Manager, at rmcfarlane@ritzholman.com or 414-271-1451.