

**PROFESSIONAL OPPORTUNITIES**  
**With**

**DAL POGGETTO & COMPANY LLP**  
**Certified Public Accountants**

We are pleased to provide this information regarding professional opportunities with our firm to assist you in making your career decisions. This introduction to our firm contains information on the following:

1. Background of Dal Poggetto & Company LLP
2. Representative Services and Industries Served
3. Compensation and Benefits
4. Professional Opportunities

### **Background of Dal Poggetto & Company LLP**

Dal Poggetto & Company LLP is a public accounting firm which was formed on November 1, 1992 when Jon Dal Poggetto, partner in charge of the Santa Rosa office of Deloitte & Touche LLP, separated his practice from his former firm's due to its decision to consolidate resources into its Oakland office. Our firm's structure provides organizations in the North Bay Area with access to world class accounting services at rates that are competitive with other local firms, and the focus of our professional practice is in meeting the auditing, accounting, tax and management consulting needs of emerging privately-held companies and other organizations.

We provide specialized training and supervision for both audit and tax work assignments undertaken by staff. We believe this is an absolute necessity in today's complex environment of evolving accounting pronouncements and changing tax laws. However, our staff all receive cross-discipline assignments, particularly in their first several years, in order to develop a well-rounded base of professional experience. This provides opportunities for staff to work with client organizations and individuals with complex accounting and tax services needs, under the supervision of a senior management group with extensive audit, accounting and tax experience.

We have been able to apply a best practices benchmarking approach to developing our practice management policies as a result of the experience of our partners. This has resulted in state-of-the-art practices for the delivery of services to our clients, including the extensive use of current technology in all client service applications.

We are deeply committed to the people who work for our firm, extending beyond the daily professional assignments of our staff. We encourage community service by our people and provide opportunities and time to work with others in our firm who serve as board members, volunteers and in advisory capacities for civic, charitable and cultural organizations. We believe this experience broadens the development of our staff and benefits the communities in which we and our clients live and work. Our commitment has resulted in our firm being recognized as one of the Best Places to Work in the North Bay by the North Bay Business Journal each year since 2007, the first year our firm was eligible for the award.

## **Representative Services and Industries Served**

The firm's mission is to take a genuine interest in each client, thoroughly understand their needs and objectives and exceed their expectations for service.

We provide audit, review and other assurance services for clients of all sizes and in many different industries, and we believe our accounting and auditing practice is of the highest quality and comparable to the audit practices of the Big Four accounting firms. Our managing partner was the partner in charge of auditing for Deloitte & Touche LLP and its predecessor firms in Santa Rosa for over ten years, and we are a voluntary member of the Private Companies Practice Section of the American Institute of Certified Public Accountants, which was established to ensure the consistent quality of audit services provided by accounting firms through a mandatory peer review process. Our firm successfully completed the most recent review of our audit practice and received an unqualified opinion as to our compliance with stringent quality control standards.

Tax services are critical to the financial needs of our clients and represent a substantial component of our practice. We have a long-standing reputation for personalized income tax planning and preparation services provided to clients of all types, including corporations, partnerships, limited liability companies, trusts and high wealth individuals. Our assistance with proactive tax planning for various types of business transactions, including mergers and acquisitions, has greatly enhanced after tax cash flow for many of our clients.

Management consulting services are an important and valuable aspect of our relationships with our clients. We have significant consulting experience as a result of having served clients in many diverse industries for so many years. Our array of consulting services compares favorably with that of the largest public accounting firms. We frequently have the opportunity to assist clients with advisory services, such as operational review and profit improvement studies, strategic planning, systems development and general business consultation.

We serve clients in virtually all industries, including agribusiness, employee benefit plans, healthcare, manufacturing, retail and distribution, construction, real estate, high technology and not-for-profit organizations. We enjoy a particularly strong reputation in the wine industry, with more than eighty winery and vineyard clients located throughout Northern California. However, the most common characteristic of our clients is the fact that they tend to be closely-held and owner-managed organizations, with a need for an integrated approach by their public accounting firm in providing accounting, tax and consulting services in a responsive and proactive manner. We are proud of the reputation we have achieved in providing responsive, personalized service to our clients.

## **Compensation and Benefits**

Our compensation and benefit structure has been carefully designed to be competitive with Big Four accounting firms and responsive to the needs of our people. Compensation and benefits for entry level staff currently include a competitive salary, compensated time off, health, dental and life insurance, a Section 125 flexible spending benefit plan, 401(k) and profit sharing plans and reimbursement for professional society dues and expenses. The firm pays for time off to take the CPA exam and pays a bonus to staff to cover the registration costs of their initial exam. Other benefits offered include reduced work schedules, time off for community service, a mentoring program and remote work options.

## **Professional Opportunities**

Professional development of our staff and partners is a top priority of our firm. We believe the high quality of our audit and tax practice is critically dependent on the technical training that our staff receives. We provide 80 hours of formal technical training to our professional staff each year, a policy that greatly exceeds the requirements for licensure by the State Board of Accountancy as well as the policies of other accounting firms. This formal training may be provided through courses developed by the California Society of CPAs, universities and colleges, other professional organizations and in-house training courses taught by partners and staff.

In addition to these formal training courses, on-the-job training takes place on all assignments for all staff. Our experience has been that much of a new staff person's continuing development comes from identifiable work activities closely supervised by experienced personnel. Our partners and senior staff are committed to the professional development of our people through timely supervision and review and frequent feedback.

Opportunities for advancement within our firm are virtually unlimited. We expect that our practice will continue to grow at a high rate, and we are carefully selecting and training our staff to meet the challenges of growth. Our investments in the professional development of staff are designed to provide the firm with an experienced and highly motivated management group to serve the needs of our expanding client base.

## **Summary**

We are a growing firm with a strong reputation for quality work and responsive service. We invite you to discuss your career plans with our campus representatives. We promise that we can deliver to you the opportunity to work with dedicated professionals in satisfying the audit, accounting, tax and management consulting needs of an exceptional list of clients, and to become a truly valued business advisor to them. We hope you choose to pursue that opportunity.

### **Equal Opportunity Employer**

Dal Poggetto & Company LLP is an equal opportunity employer. We recruit, employ, train, compensate and promote without regard to race, color, religion, national origin, gender, gender orientation, marital status, pregnancy, veteran's status, disability or any other bias prohibited by law.

### **For More Information**

For more information on Dal Poggetto & Company LLP, visit our website at [www.dalpoggetto.com](http://www.dalpoggetto.com) or e-mail us at [info@dalpoggetto.com](mailto:info@dalpoggetto.com).