

OUR PEOPLE.  
OUR PURPOSE.  
OUR PROMISE.

Meet Warren Averett



 **Warren  
Averett**  
CPAs AND ADVISORS  
[www.warrenaverett.com](http://www.warrenaverett.com)

## THE WARREN AVERETT BRAND PROMISE

Thrive and accomplish what's important to you with the passionate commitment of Warren Averett's resources and culture at your side.

## OUR CORE VALUES

Our work every day is driven by our seven corporate values. We believe that these principles we profess are some of the same ideals our clients hold to and help make them successful. These values are the essence of our identity as a firm.

-  INTEGRITY IN ALL WE DO
-  SOLID RELATIONSHIPS
-  INTENSE CLIENT FOCUS
-  ENTREPRENEURSHIP
-  PASSION TO WIN
-  SHARING OUR SUCCESS
-  TEAM MINDSET



I love the partnership. We've been working with the same Warren Averett staff member for years who **UNDERSTANDS OUR NEEDS** and is a huge asset to our agency.

— Warren Averett Client

## WHAT WE DO

Warren Averett is an accounting and advisory firm that takes the time to learn what our clients' goals are, and then we pull out all the stops to help them make it a reality.

We've been helping companies of all sizes and industries reach high goals, adapt to new environments and conquer unique challenges since 1972—and even longer than that for some of our predecessor firms.

We're best known for top-notch traditional accounting, tax and audit services, but as we've listened to our clients' problems and helped companies conquer obstacles through the years, we just couldn't stop there. We've developed even more ways to help build and protect value in nearly every aspect of our clients' businesses.





The ability to call them and work directly with them on high-level matters contributes to our overall **SUCCESS.**

— Warren Averett Client

## WHO WE HELP

Our goal is to be our clients' true and trusted advisors. That's why we host dedicated industry groups that are committed to serving specific types of organizations.

**Financial Services**

**Healthcare**

**Natural Resources**

**Professional Services**

**Transportation**

**Construction**

**Government**

**Nonprofits**

**Hospitality, Retail & Restaurants**

**Real Estate**

**Education**

**Government Contractors**

**Alternative Investment Services**

**Manufacturing & Distribution**

**Private Equity**

**Technology & Life Sciences**

## OUR VISION AND STRATEGY

Warren Averett's vision for success lies in what we call our "A+ Wheel." The A+ Wheel has three interlocking facets that all contribute to and gain from each other.

### A+ Service

"A+ Service" means providing the best possible work and experience for anyone we interact with—from the largest and most prestigious project to the most humble of tasks. When our team specializes in serving companies in specific industries, we're able to provide the highest standard of insight that's relevant to our clients.

### A+ Clients

"A+ Clients" refers to the individuals and businesses that our firm provides services to. Warren Averett strives to only onboard and retain the best of entities to receive accounting and advisory services. An A+ Client is an entity that values strategic input from our advisors, is profitable, shows respect, is influential in their industry and community and values their relationship with our firm.

### A+ Talent

"A+ Talent" refers to the best and brightest professionals. Warren Averett's goal is to attract, retain, develop and utilize those team members who are responsible, insightful, curious, passionate, proactive and reliable at the highest level. The essence of "A+ Talent" is to always be learning, growing and developing.

The ability to provide A+ Service is what allows our firm to attract A+ Clients. The opportunity to work with A+ Clients helps to attract A+ Talent. And having A+ Talent is a necessity to be able to provide A+ Service. While seasons, specifics and systems may ebb and flow, Warren Averett believes that the key to a successful firm always lies within these three areas, together creating the A+ Wheel.



Customer service has always been top-notch! Response time is short, and answers are easy to understand.

**THEY ARE THE BEST!**

— Warren Averett Client



## OUR TRACK RECORD

Warren Averett is consistently ranked among the best in the nation by those who know accounting.



## WHO WE ARE

Our advisors are highly credentialed experts with deep technical experience, and we're proud of their track record of excellence, awards and achievements.

Beyond their professional expertise, our advisors are also your 750+ friends and neighbors who are passionate about supporting meaningful causes, helping their communities and being kind. You won't be able to see that in the letters after their names, but we're proud of that, too.

Our team boasts the following designations:

- AEP** – Accredited Estate Planner
- CAMS** – Certified Anti-Money Laundering Specialist
- CCA** – Certified Construction Auditor
- CCD** – Certified Credit Union Director
- CCIFP** – Certified Construction Industry Financial Professional
- CDMM** – Certified Daily Money Manager
- CDPSE** – Certified Data Privacy Solutions Engineer
- CEH** – Certified Ethical Hacker
- CEPA** – Certified Exit Planning Advisor
- CFE** – Certified Fraud Examiner
- CFF** – Certified in Financial Forensics
- CFP** – Certified Financial Planner
- CGFM** – Certified Government Financial Manager
- CGMA** – Chartered Global Management Accountant
- CHBC** – Certified Healthcare Business Consultant
- CIA** – Certified Internal Auditor
- CISA** – Certified Information Systems Auditor
- CISM** – Certified Information Security Manager
- CISSP** – Certified Information Systems Security Professional
- CITP** – Certified Information Technology Professional
- CMMC-RP** – Cybersecurity Maturity Model Certification Registered Practitioner
- CMPE** – Certified Medical Practice Executive
- CPA** – Certified Public Accountant
- CPA/ABV** – Certified Public Accountant/Accredited in Business Valuations
- CPC** – Certified Professional Coder
- CPT** – Certified Penetration Tester
- CRISC** – Certified in Risk and Information Systems Control
- CSP** – Certified Staffing Professional
- CVGA** – Certified Value Growth Advisor
- EA** – Enrolled Agent
- ERPA** – Enrolled Retirement Plan Agent
- MTA** – Microsoft Technology Associate
- PFS** – Personal Financial Specialist
- PMP** – Project Management Professional
- QKA** – Qualified 401(k) Administrator
- QPA** – Qualified Pension Administrator
- SPHR** – Senior Professional in Human Resources
- TSC** – ASA Technical Services Certified
- WAPT** – Web Application Penetration Tester

They are always **AVAILABLE** and knowledgeable to answer any questions I have.

— Warren Averett Client

## WHERE WE ARE

With 13 offices across the Southeast including 300 CPAs, 100 Members and over 750 employees, Warren Averett has the experience and depth to successfully meet the needs of our clients.

Our firm has physical locations in Alabama, Florida and Georgia, but we serve clients in all 50 states (and in 36 countries). As we've leaned into technology to increase our connectivity and efficiency, it's helped us to be readily accessible to you—whether we're right down the street in your hometown or across the country.



## WHAT WE'RE UP TO NOW





Keep up and connect with our firm digitally, 24/7. Warren Averett's advisors weigh in on pertinent business topics through:



- Articles
- Videos
- Podcasts
- Events
- and more

**Scan this code and sign up for our newsletter today!**

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