



THE RAINMAKERS' FORUM™



Linda Wescott

Principal

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www.Savastanokaufman.com

Affiliation: Savastano Kaufman & Company, LLC

Years in Present Occupation: 26 Years

Services Offered:

Accounting and Tax Services.

14-Second Sound Bite:

“I help closely held businesses and individuals analyze and understand their financial statements and tax returns in order to properly plan for the future and achieve their goals.”

How Linda is Different From Others in the Field:

She listens to her clients and understands how businesses work. Her first step and continued focus is to develop a deep understanding of each client’s unique business so that she can apply her regular basis. Her goal is to not just report on historical financial information, but to bring new business ideas to each client meeting.

The Best Way to Introduce Linda:

“It is my pleasure to introduce you to Linda Wescott. She is an exceptional accountant who readily shares her knowledge and expertise in tax and accounting matters. Her forward thinking approach and personal attention to her clients would certainly make a meeting with her worthwhile.”

116 West 23rd Street, Suite 500, New York, NY 10011 and 102 River West, Greenwich, CT 06831

Phone: (212) 386-7604 Fax: (646) 349-1067 Email: info@rainmakersforum.com Web Site: www.rainmakersforum.com



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PERSONAL PROFILE

Linda Wescott is a principal at Savastano Kaufman & Company, LLC. With over 26 years of experience in the accounting profession, she focuses on providing clients, in a wide variety of industries, with insightful business and tax advice while maintaining the highest level of personal service to individuals, small businesses and large corporations. Linda has been extremely successful in applying complex accounting, auditing and tax concepts to her clients in an understanding way resulting in producing quality financial statements and tax returns effectively and efficiently. Linda heads the Firms Accounting and Auditing Quality Control Committee. The firm has received the professions highest honor of maintaining an unqualified peer review over the course of the firms twenty-five plus years in practice.

Professional Designations and Other Distinctions:

- Certified Public Accountant in New Jersey and Florida.
- Member of the American Institute of Certified Public Accountants.
- Member of The College of New Jersey with a Bachelor of Science.
- Heads the Firm Quality Control Committee.

ENTERPRISE PROFILE

Savastano Kaufman & Company, LLC is a quality reviewed certified public accounting firm, which was formed in 1986. The Firms philosophy is to offer quality service for a competitive price. The Firm's clients represent nearly all facets of the economic spectrum with operations both national and international in scope. The Firm, whose principal office is in Fair Lawn, NJ, has grown to include five principals and employs approximately twenty-five professionals. While we are gratified by our steady growth, we are determined to continue to provide personalized services to each and every client. All of our clients receive to direct attention of a firm principal who maintains direct client contact, plans and supervises all services, and is responsible for client satisfaction.

Ranked by *New Jersey Biz Magazine* as one of the top fifty accounting firms in New Jersey, we have grown by focusing not on our growth but on the growth and success of our clients. Our clients are able to reap the benefits of a "big firm" menu of services and a one-step solution provider while receiving close personal attention at affordable rate.

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AVERAGE ANNUAL CLIENTS REPRESENTED

A) Closely-held Businesses	
Early Stage	
Under \$1 Million Annual Revenue	
\$1–\$5 Million Annual Revenue	21
\$5–\$10 Million Annual Revenue	5
\$10–\$50 Million Annual Revenue	17
Over \$50 Million Annual Revenue	
Categories	
Consulting	
Entertainment	
Financial Services	1
Food Services	1
Graphic Design / Marketing	
Healthcare	5
Information Technology	
Light Manufacturing	6
Heavy Manufacturing	
Non-Profit Organizations	4
Physicians	
Professionals	1
Real Estate Development and Construction	4
Retail	1
Service Companies	17
Warehousing and Distribution	3
Other	
B) Individuals and Families	
Income:	
Under \$100K Annual Income	
\$100K–\$200K Annual Income	7
\$200K–\$400K Annual Income	12
Over \$400K Annual Income	16
Unknown	
Estimated Net Worth, Exclusive of Primary Residence:	
\$250K–\$500K	6
\$500K–\$1 Million	2
\$1–\$2 Million	8
\$2–\$5 Million	5
Over \$5 Million	14
Unknown	

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REFERRALS SUMMARY		
	LIKELY REFERRALS TO BE MADE (TO)	POSSIBLE SECOND OPINION REFERRALS
Accountants		
Alternative Financing Sources		
Asset-Based Lenders		YES
Leasing Companies		YES
Other		
Attorneys		
Business / Transactional		YES
Bankruptcy / Turnaround		YES
Divorce		YES
Intellectual Property		
Real Estate		YES
Trusts and Estates		YES
Business Bankers		YES
Coach / Consultants		
Business Coach		YES
Life Coach		
Management Consultant		YES
Financial Planners		YES
Information Technology Firms		YES
Life / Health Insurance Agents		YES
Marketing and Communications		
Graphic Design / Websites		YES
Marketing / Sales Consultants		
Mortgage Bankers		YES
P&C Insurance Brokers		YES
Real Estate Agents / Brokers		
Commercial		
Residential		
Tenants' Representatives		
Wealth Advisors		YES

Enter "Yes" if you are capable of, and willing to, arrange for "Second Opinion" meetings with prospects for each category.



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NUMBER OF RELATIONSHIPS I MAINTAIN WITH PEOPLE IN THE FOLLOWING CATEGORIES			
	RELATIONSHIP		
	CASUAL	WORKING	AAA
Accountants			
Alternative Financing Sources			
Asset-Based Lenders			
Leasing Companies			
Other			
Attorneys			
Business / Transactional	5	2	
Bankruptcy / Turnaround	1		
Divorce			
Intellectual Property			
Real Estate			
Trusts and Estates	5	4	1
Business Bankers	15	5	3
Coach / Consultants			
Business Coach	10		
Life Coach			
Management Consultant			
Financial Planners	10	3	2
Information Technology Firms	10		1
Life / Health Insurance Agents	7	3	
Marketing and Communications			
Graphic Design / Websites	5	2	1
Marketing / Sales Consultants	5		
Mortgage Bankers	6	3	
P&C Insurance Brokers	5	2	
Real Estate Agents / Brokers			
Commercial	5		
Residential	3		
Tenants' Representatives			
Wealth Advisors	15	5	2

- “Casual” – I know this person but we have not worked together.
- “Working” – We have worked together but we do not share an in-depth relationship.
- “AAA” – We share a deep, trusting relationship.



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REFERRAL TRIGGERS

A) Business:

- Client expressing dissatisfaction with present accountant.
- Company being taken over by next generation.
- Company that has outgrown its present accounting firm.
- Company seeking a firm with cross-border contacts.
- Company being purchased or sold.
- New or emerging company.
- Merger or acquisition transaction.
- Company requiring a work-out.
- Company suffering from poor results of tax planning or audits.
- Foreign company opening U.S. subsidiary.

B) Individual:

- Expressing dissatisfaction with present accountant.
- Going through divorce and should consider changing accountants.
- Suddenly acquired wealth.
- Suffering from poor results of tax planning or audits.
- Seeking to enter the U.S.
- Would be receptive to a second opinion regarding accounting, financial or tax issues.
- Recently married or divorced.

C) Complex tax issues for both enterprises and individuals:

- Experiencing or about to have litigation surrounding income, payroll or sales tax issues.
- Undergoing a difficult tax audit or facing tax litigation.
- Interested in advance rulings regarding esoteric tax issues.
- Non-profit status being threatened.

IDEAL REFERRAL SOURCES

- Business Bankers
- Attorneys
- Financial Planners
- Wealth Advisors
- Business Coaches
- Management Consultants
- Bonding Agents

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