

Led by a strong team of professional advisors, GROCO focuses on helping clients achieve an ideal quality of life. We understand that personal time is important to our clients. We are committed to developing solutions which allow them to spend more time with their families.

SERVICES OFFERED

Individuals & Families

- Tax Planning & Preparation
- Stock Option Planning
- Bill Paying & Cash Flow Management
- Retirement and/or Business Succession Planning
- Family Office & Wealth Preservation
- Financial Planning
- Tax Aspects of Investments
- Philanthropic Planning
- Estate & trust Planning and Administration
- Financial Statements
- Banking & Credit Relationships
- Employee to Entrepreneur Strategies

Businesses

Tax

- Corporate, Partnership & Trust
- Non-Profit Organization Returns
- International & Multistate Tax Planning
- Property Tax Returns
- Shareholder Tax Issues
- Payroll and Sales Tax Consulting

Accounting & Auditing

- Preparation of Financial Statements
- Audits & Reviews
- Cash Flow Analysis & Projection
- Bookkeeping Services

Financial & Strategic Management

- Consulting Services
- Start-up Company Planning & Business Plan Review
- Compensation & Benefit Plans
- Mergers and Acquisitions
- Entity Restructuring
- Research and Development Studies
- Financial Consulting
- Review of Contracts
- Revenue Recognition Strategies

Business Valuations

- Ownership Related (ESAP, 409A, SAR)
- Tax Related (Estate/Gift, FLP)
- Transactions (Sales, Purchase, Acquisitions)



BEST PLACE TO WORK: Nationally recognized by *Accounting Today* as Best Accounting Firm to Work for and locally, *The San Francisco Business Times* named GROCO to their "Best Place to Work in the Bay Area" list.

BEST MANAGED FIRM: GROCO was honored by *INSIDE Public Accounting* as one of the top 25 best managed CPA firms in the entire nation.

FASTEST GROWING COMPANY: *The San Francisco Business Times* and *Silicon Valley/San Jose Business Journal* named GROCO to their "Fastest Growing Company" lists.

BEST QUALITY & INNOVATION: Robert Sher, principal of CEO to CEO, singled out Alan Olsen and GROCO for its outstanding marketing program, quality and growth.

TOP FINANCIAL PLANNER: GROCO was recognized by *CPA Wealth Provider* magazine as a winner of the national Financial Planning Award.

“

"GROCO's strong technical knowledge, integrity, and business expertise has been invaluable to me. My family and I have trusted our team at GROCO with both business and personal financial planning issues for over thirty years."

Tom Perkins
Kleiner, Perkins, Caufield & Byers

"GROCO has advised us with business solutions and tax strategies that have continually put us in a financially lucrative position. Unlike other firms, whenever I have a question, GROCO responds quickly with well-researched answers and valuable input."

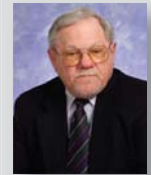
Don Lucas
Sandhill Financial Group

GROCO is a full-service certified public accounting firm advising and assisting our clients with their accounting, tax, wealth preservation, financial and strategic planning needs. Whether you are a high net-worth individual seeking tax planning advice, someone about to experience a liquidity event or a professional in transition, Greenstein, Rogoff, Olsen & Co. is ready to assist you.

PARTNERS



Alan L. Olsen
CPA, MBA (Tax)
Managing Partner



Morey Greenstein
CPA
Founding Partner



Steve Singer
CPA, MS



Ron Cohen
CPA, MS (Tax)



Hal Friedman
JD

Since 1964, our partners have advised hundreds of entrepreneurs in building their companies and preserving their wealth. Our clients participated in building companies like Google, Oracle, Skype, America Online, Sun Microsystems, Compaq, Macromedia, and Genentech.

PROUD MEMBERS OF



ABOUT THE FIRM

GROCO is the trusted advisor to the highly successful. Our clientele include some of the most successful entrepreneurs in the Silicon Valley. We are long-term partners who carefully evaluate your financial and business objectives. We provide strategic and innovative solutions to positively impact your bottom line. Historically considered a premiere Bay Area accounting firm, GROCO has now been nationally recognized as a top CPA firm. See "Recognitions" at www.GROCO.com. GROCO uniquely provides clients unsurpassed value with Big Four accounting firm expertise at regional firm prices.

ALAN L. OLSEN, CPA, MBA (TAX)



Alan is managing partner at Greenstein Rogoff Olsen & Co., LLP, a leading CPA firm in the San Francisco Bay Area. With more than 25 years of experience in public accounting, he works with some of the most successful venture capitalists in the world, developing innovative financial strategies for individuals and businesses.

His firm was recently recognized by INSIDE Public Accounting as one of the Best Managed CPA firms in the USA. His firm also garnered both local and national awards for being one of the "Best Places to Work," and "Fastest Growing Companies" in the Bay Area. A nationally recognized speaker, author and consultant, Alan has appeared on Fox News, KPIX and KRON television networks. He has been quoted and published by various media outlets such as CNN Money, Money Magazine, Consumer Reports - Money Advisor, and Money Matters.

As chair of the Friends of Scouting Campaign, Alan raised over \$1 million and in 2010 he received the Silver Beaver Award from the Boy Scouts of America for distinguished service to youth. He also received the Chairman's Award from the Fremont, California Chamber of Commerce. He continues to be active in several educational, health care and community foundations.

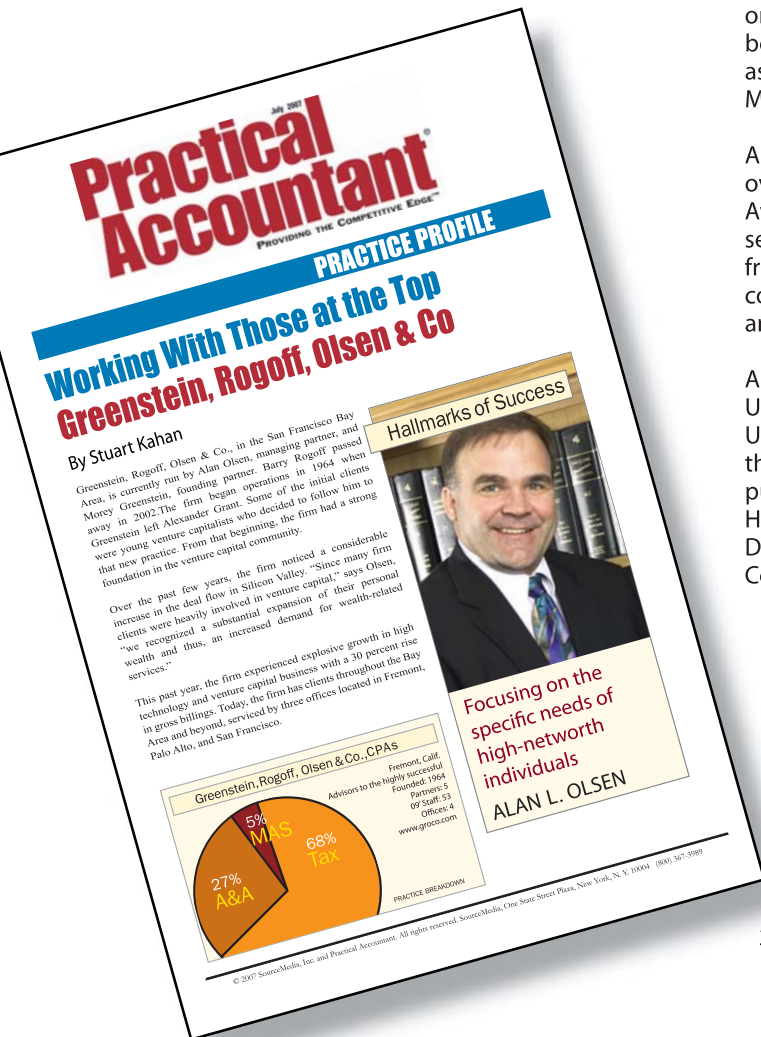
Alan earned a B.S. in Accounting from Brigham Young University and an MBA (Taxation) from California State University at Hayward. Recently, he was honored by more than 7,000 Bay Area alumni recognizing his continuous public service advancement and career accomplishments. He currently serves on President Kim B. Clark's (Former Dean of the Harvard Business School) Advancement Council at Brigham Young University-Idaho.



GROCO
GREENSTEIN, ROGOFF,
OLSEN & CO., LLP, CPAs

GROCO.com | (510) 797-8661

39159 Paseo Padre Parkway, Suite 315, Fremont, CA 94538
2479 East Bayshore Road, Suite 700, Palo Alto, CA 94303
50 California Street, Suite 1500, San Francisco, CA 94111



GROCO
GREENSTEIN, ROGOFF,
OLSEN & CO., LLP

CERTIFIED PUBLIC ACCOUNTANTS

FREMONT

PALO ALTO

SAN FRANCISCO