

PERSONNEL-SUPPORT SERVICES

J.L. Cohen & Associates, Ltd. offers non-traditional services in other areas of company management. Our expertise can be and has been called upon to offer help, devise plans, review options, and offer advice in many areas ancillary to the practice of good business. Here are some other concerns for which we are available.

RECRUITING AND TRAINING

Locating, Screening, recommending, and training accounting personnel are services that fall easily within our purview. Our resources for checking references are strong. Our ability to evaluate the competence of people in this field and to train personnel in accounting procedures is in direct proportion to our own experience in selecting and training our personnel. Performance evaluation and potential, two other key areas in personnel management, are also services that we perform for our clients who desire them.

PERSONNEL COMPENSATION

Many small companies are aware that the work environment has changed. They are interested in developing employment compensation plans that will advance with their industry standards. We can suggest a variety of plans that provide motivation and stability. New compensation plans may be developed based on sales and profits, or on comprehensive fringe benefits packages. Where the retention of key personnel is a concern, we can negotiate on a client's behalf. If the requirement is designing profit and equity participation plans to ensure the fair treatment of key personnel and the security of the business, we use our familiarity with the basis of a company's financial structure to facilitate these goals.

PLANNING FOR SHAREHOLDERS AND KEY PERSONNEL

We recognize that our clients are in existence because of the people who own the company and manage the business. We are, therefore, poised to offer whatever knowledge and experience we have to these shareholders and key personnel. We are most active in the areas of personal income and estate tax planning; concern for the liquidity of the corporate investment; general investment advice; and evaluation of specific investment opportunities. Again, our expertise in these areas makes our advice, based on our knowledge of the client's business, a valuable source of information.

LIFE INSURANCE

Our firm has consistently maintained a high level of expertise in life insurance and related fields. While we are not insurance professionals, our objective and unbiased perspective allows us to consult with those clients making insurance decisions. The combination of our tax and business planning expertise enables us to determine the most appropriate insurance plan for a client. Based on our experience with our client and our knowledge of the insurance industry, we present our clients with insurance agents to develop the best program for their needs.

At J.L. Cohen & Associates, Ltd., your personnel concerns can often be met with our help. Call us at 610.258.0819 to discuss those areas of concern for you and your employees, shareholders, and key personnel.