

# Financial Scorecards for Family Businesses

## BENCHMARK THE FINANCIAL PERFORMANCE OF YOUR FAMILY BUSINESS YEAR-OVER-YEAR AGAINST INDUSTRY PEERS

Financial scorecards are a performance management tool designed to help family business owners and executives identify, track, and improve internal business metrics and their resulting external outcomes. This process will translate your company's financial statements into meaningful operational charts and graphs to aid in the interpretation of your company's performance. Financial scorecards can also provide insight into project, product, or service decisions while giving you a tool to clearly measure and monitor your progress toward strategic targets.

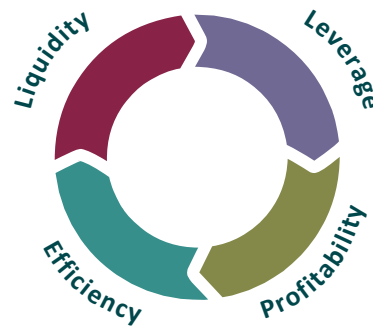
### FINANCIAL SCORECARD BENEFITS

- Promotes a greater understanding of your company's historical financial performance
- Provides real-time financial data and industry intelligence for your industry peer group
- Helps identify strengths, weaknesses, opportunities, and threats in financial performance
- Offers recommendations for improvement in financial metrics

### INFORMATION INCLUDED IN FINANCIAL SCORECARDS

Kreischer Miller's financial scorecards provide real-time financial metrics and trends for your business versus those of comparable companies based on your industry classification. Your financial scorecard will include:

- Historical analysis of financial performance
- Comparison to industry metrics
- An evaluation of 4 key financial metrics:
  - Liquidity
  - Leverage
  - Profitability
  - Efficiency
- Observations on areas of improvement based on variances from industry benchmarks



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# About Kreischer Miller

## Who We Are

Kreischer Miller is a leading independent accounting, tax, and advisory firm serving the Greater Philadelphia and Lehigh Valley areas. We've built our firm to respond to the unique needs of private companies, helping you smoothly transition through growth phases, business cycles, and ownership changes.

You need to be able to quickly adapt and respond to changing market opportunities and challenges. That's why our focus is on being responsive, decisive, and forward-thinking. We're up to the challenge—always looking at the road ahead and not in the rear-view mirror.

Our people are leaders in accounting and business and we are passionate about helping you achieve your goals. While others claim their people are the difference, we'll show you that our people are different through each and every interaction.

## What We Do

Kreischer Miller can meet all of your accounting and tax needs—and beyond. Our team has Big 4 and relevant industry experience and offers the resources and expertise of an international accounting firm with the accessibility and responsiveness of a regional firm.

We take an advisory approach in everything we do, working diligently to understand what your business needs to move ahead and providing the tools to help you get there.

## Advisory

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- Business valuation
- M&A / transaction advisory services
- Transition / exit planning
- ESOPs
- Technology solutions
- Retained executive search
- Talent advisory
- Small business advisory

## Audit & Accounting

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- Audit and accounting services for owner-operated companies, family-owned businesses, private equity-backed companies, employee benefit plans, ESOPs, not-for-profits, and small businesses
- Customized, risk-based audit procedures and practical solutions to business issues such as enterprise risk assessments, internal control design and testing, financial forecasting, benchmarking, and due diligence

## Tax

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- Practical tax strategies and guidance for individuals, corporations, limited liability companies, partnerships, estates, trusts, and not-for-profits
- State and local tax planning and compliance
- Sales and use tax planning, compliance, and audits
- Tax credits and incentives
- Succession planning and family exit strategies
- Gift and estate planning
- International tax