



Kerkering, Barberio & Co.
Certified Public Accountants

Allegiant Private Advisors
Customized Wealth Management

KB Pension Services, Inc.
Retirement Planning and Administration for Businesses



OUR COMPANIES

Similar to the Sarasota skyline, the CPA firm of Kerkering, Barberio & Co., founded in 1972, has grown and matured. Through the process of growing with our community, we have evolved into three distinct companies — with one mission: bringing together the best people, quality services and innovative products to assist our clients in achieving their personal, business and financial goals.

These companies, collectively known as Kerkering Barberio, offer a seamless array of expert services and include:

- **Kerkering, Barberio & Co.**
Certified Public Accountants
- **Allegiant Private Advisors**
Customized Wealth Management
- **KB Pension Services, Inc.**
Retirement Planning and Administration for Businesses

Kerkering Barberio is dedicated to quickly adapting and expanding new products and services. This responsive attitude keeps our firm at the forefront of financial professionals. We take pride in assisting individuals and businesses achieve their financial goals.



OUR SHAREHOLDERS

Paul Cantor, CFA/AIF*

Christopher M. Chiaro, CPC/QPA/QKA/ERPA

Robert P. Clarke, CPA

John Cotterman, CPC/QPFC/APR/ERPA

Beth C. Ebersole, CPA/ABV

Patricia Entsminger, CPA/CFE/CIA

Shirley Irons Faist, CPA

Shirley E. Fieber, CPA

Larry Geimer, CPA/CDFA™

Renea M. Glendinning, CPA

Michael Goldstein, CPA/CFP*

Kathleen A. Hargreaves, CPA/CFP*/CPC*

Barbara A. Jones, CPA/CFP*

Benjamin W. Jones, CFP*/AIF*

Martin J. Kossoff, CFP*/AIF*

Robert J. Lane, CPA

Brian L. Leidel, CPA/CFP*/PFS

Eric Troyer, CPA

Phoebe Trumpler, CPA

Heather Williams, CPA/CFP*

OF COUNSEL

Allan J. Barberio, CPA

Charles R. Baumann, CPA

Richard E. Goble

Caroline D. Strickland, CPA



*Serving Sarasota, Manatee,
and Hillsborough Counties*

Kerkering, Barberio & Co.

Telephone (941) 365-4617

Fax (941) 954-3207

Toll Free (800) 966-8676

1990 Main Street, Suite 801

Sarasota, Florida 34236

P.O. Box 49348

Sarasota, Florida 34230-6348

9423 Town Center Parkway

Lakewood Ranch, Florida 34202

4350 West Cypress Street, Suite 930

Tampa, Florida 33607

Telephone (813) 675-8800

Allegiant Private Advisors

Telephone (941) 365-3745

Fax (941) 953-7430

Toll Free (800) 926-5237

240 S. Pineapple Avenue, Suite 200

Sarasota, Florida 34236

1990 Main Street, Suite 801

Sarasota, Florida 34236

KB Pension Services, Inc.

Telephone (941) 953-7452

Fax (941) 954-3207

9423 Town Center Parkway

Lakewood Ranch, Florida 34202

P.O. Box 1414

Sarasota, Florida 34230-1414

kbcpa@kbgrp.com

www.kbgrp.com



Our mission at Kerkering Barberio is bringing together the best people, quality services and innovative products to assist our clients in achieving their personal, business and financial goals.

DOWNTOWN SARASOTA



LAKWOOD RANCH



TAMPA



Audit, Advisory, and Assurance

Delivering well-planned, efficient audits and advisory services while providing insightful financial, operational and managerial recommendations to address your most critical financial and reporting issues.

Business Valuation

Determining the financial worth of a closely held business for consulting and compliance for gifts, estates, sales, purchases and other situations.

Construction Services

Offering tax and accounting services specifically focused on the complexities of the building and development industries.

Enterprise Risk Management

Building value and seizing opportunities for organizations by taking a risk approach to managing financial, technology and business risks.

Estate and Trust Planning

Planning now for future legacy, family well-being and the use of assets to achieve post-life goals.

Financial Services*

Offering the finest in customized wealth management; helping high net worth families to maintain their lifestyle and pursue their long-term financial goals.

*Advisory Services Offered Through Commonwealth Financial Network, a Registered Investment Adviser.

Forensic Accounting and Litigation Support

Assisting clients and their legal counsel through all phases of a case by presenting informed analysis, quantifying potential damages, conducting financial investigations, and providing expert witness testimony.



www.kbgrp.com



Individual and Business Tax Consulting

Providing tax compliance and consulting for individuals and businesses on a year-round basis.

Internal Audit

Working with business clients to meet their internal audit needs through co-sourcing, outsourcing, consulting, forensic accounting and litigation support.

International Consulting and Tax Planning

Assisting non-citizens and non-resident aliens in U.S. tax compliance with a focus on change of residency, estate and gift taxation, real property, business strategies and tax treaty consulting.

KB Healthcare Consultants

Helping healthcare entities successfully navigate the challenges of a changing economic environment.

Nonprofit Organization Services

Working with nonprofits to help them maneuver complex governmental regulations and the unique challenges of their industry through audit and tax services, training and consulting.

Outsourced Accounting Services and Bookkeeping

Providing an array of accounting services that can range from supporting your internal staff to overseeing the entire accounting operation.

Real Estate Support Services

Supporting those involved in the real estate business and real estate transactions with analysis, review and consulting to assure the value of their investment.

Retirement Planning and Administration for Businesses

Assisting business owners with the design, implementation and administration of 401(k) and other employee savings plans.

Kerkering Barberio services a wide range of businesses, organizations and individuals.

The variety of clients we represent is indicative of the depth and diversity of our abilities. The following are only some of the entities we service:

Agribusiness
Ambulatory Surgery Centers
Auto Dealers
Commercial and Residential Real Estate Investors
Condominium Associations
Construction Contractors
Country Clubs
Emerging Businesses
Employee Benefit Plans
Engineers
Estates and Trusts
Extended Care Facilities
Foreign Investors
Hospitality Businesses
Imaging Centers
Importers and Exporters
Individuals
Insurance Agencies
Manufacturers
Medical Practices
Nonprofit Organizations
Personal Service Firms
Private and Non-Private Foundations
Professional Firms
Real Estate and Commercial Brokers
Real Estate Developers
Restaurants
Retail Businesses
Software Designers and Manufacturers
Telecommunications Businesses
Wholesale Distributors

