The Whitley Penn Difference

Texas Roots. Globally Connected.

Whitley Penn is one of the largest Texas-based public accounting firms, with 97 partners, nine offices, and more than 850 professionals. For more than 40 years, we have been committed to helping clients succeed through audit, tax, and advisory services tailored to their goals. As an independent member of HLB International, a global network of independent advisory and accounting firms, we are strategically positioned to support your growth locally, nationally, and globally. Learn more about HLB International and its legal structure: www.hlb.global/legal.

HLB — WE ARE AN INDEPENDENT MEMBER OF **THE GLOBAL ADVISORY AND ACCOUNTING NETWORK**

Our Mission

We provide transformative solutions that deliver measurable value and build lasting relationships. We live this mission by:

- Sharing Knowledge & Fostering Innovation
- Embracing Diversity & Collaboration
- Promoting a Healthy & Balanced Work Environment
- Supporting Community involvement & Professional Growth

Industries & Specialties

- Agriculture
- Construction
- Energy
- Employee Benefit Plans
- Estate, Gift & Trust
- Financial Institutions
- Healthcare
- Manufacturing, Distribution & Logistics
- Nonprofit
- Private Client Services
- Private Equity & Investment Funds
- Professional Services
- Public Sector
- Real Estate
- Restaurant, Entertainment, Retail & Hospitality
- Technology
- Veterinary Medicine

Services

- **Tax**
  - State and Local Tax (SALT)
  - Federal
  - International
  - Benefit Plan (IRS Form 5500)
- **Audit**
  - SEC Filings: 10k and 11k
  - Benefit Plans
  - Private Company
  - Risk Advisory
- Advisory
  - Client Accounting & Advisory Services (CAAS)
    - Fund Administration
    - Outsourced Accounting Services
    - Controllership & InterimAdvisory
    - CAAS Energy
  - Digital Services
    - Artificial Intelligence (AI)
    - Cybersecurity
    - Data Analytics
    - Enterprise Resource Planning (ERP)
  - Deal Advisory
    - Restructuring Advisory
    - Strategic Consulting
  - Forensic, Litigation & Valuation Services (FLVS)
  - Investment & Wealth Management
  - Revenue Cycle Management (RCM)