



THE WHITLEY PENN DIFFERENCE

National Presence, Global Perspective.

Whitley Penn is one of the largest Texas-based public accounting firms in the Southwest. 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.

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



Our Industries and Services

Industries & Specialties:

- Agriculture
- Construction
- Energy
- Employee Benefit Plans
- Estate, Gift & Trust
- Family Office
- 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 We Offer:

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
 - Controllership & Interim Advisory
- Deal Advisory
 - Restructuring Advisory
 - Management Consulting
- Digital Services
 - Data Analytics
 - Digital Transformation
 - ERP Implementation
- Energy Consulting
 - Outsourced Accounting
 - Land Administration
- Healthcare Advisory
 - Revenue Cycle Management (RCM)
- Forensic & Litigation Services (FLS)
 - Commercial & IP Disputes
 - Matrimonial & Business Disputes
- Mineral Management
- Valuation
- Wealth Management (WPWealth)