

# FAST FACTS

## SALTMARSH, CLEVELAND & GUND

Saltmarsh is one of the largest locally-owned CPA and advisory firms in the Southeast, serving clients throughout the U.S. and worldwide. We offer a full range of professional services, including specialized consulting for businesses and high net worth individuals with RIA affiliate, Saltmarsh Financial Advisors.

Saltmarsh is widely respected and known as a leader among peers and clients. The firm has been recognized repeatedly as a 'Best Firm to Work For' by Accounting Today and featured by trusted sources like Forbes and Inside Public Accounting.

### SIZE OF FIRM



### OFFICE LOCATIONS

# 5

#### FLORIDA

Destin  
Orlando  
Pensacola  
Tampa

#### TENNESSEE

Nashville

### AFFILIATIONS



### YEAR FOUNDED

# 1944

### WHAT WE DO

Audit & Assurance | Business Valuation | Employee Benefits Administration | Financial Planning | Litigation Support & Dispute Advisory Outsourced Accounting Solutions | Retirement Plan Administration | Tax Advisory & Planning Estate & Trust | Technology & Managed IT Consulting Wealth Management

### WHO WE SERVE

Financial Institutions | Construction & Real Estate Development | Governments & Municipalities High Net Worth Individuals | Manufacturing | Distribution | Non-Profit | Post-Acute Healthcare

### MISSION STATEMENT

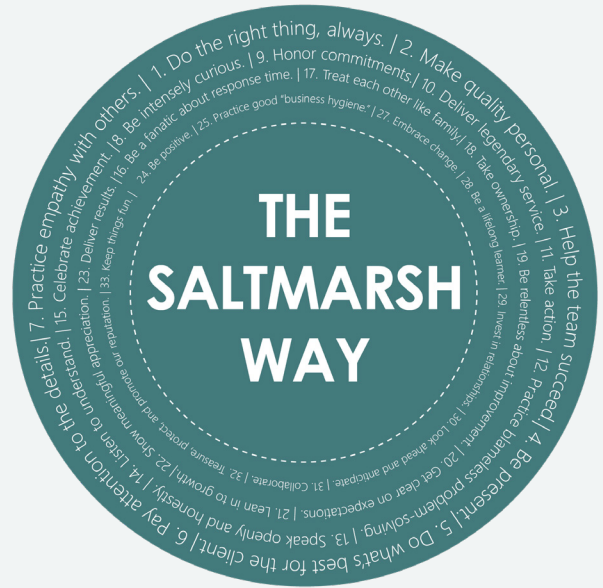
“Achieving Success by Contributing to the Success of Others”



# WE DO THINGS THE SALTMARSH WAY

1. Do The Right Thing, Always.
2. Make Quality Personal.
3. Help the Team Succeed.
4. Be Present.
5. Do What's Best for The Client.
6. Pay Attention to The Details.
7. Practice Empathy with Others.
8. Be Intensely Curious.
9. Honor Commitments.
10. Deliver Legendary Service.
11. Take Action.
12. Practice Blameless Problem-Solving.
13. Speak Openly & Honestly.
14. Listen to Understand.
15. Celebrate Achievement.
16. Be A Fanatic About Response Time.
17. Treat Each Other Like Family.
18. Take Ownership.
19. Be Relentless About Improvement.
20. Get Clear on Expectations.
21. Lean in to Growth.
22. Show Meaningful Appreciation.
23. Deliver Results.
24. Be Positive.
25. Practice Good "Business Hygiene."
26. Empower Others.
27. Embrace Change.
28. Be A Lifelong Learner.
29. Invest in Relationships.
30. Look Ahead & Anticipate.
31. Collaborate.
32. Treasure, Protect & Promote Our Reputation.
33. Keep Things Fun.

LEARN MORE ABOUT OUR FIRM & VALUES AT  
[SALTMARSHCPA.COM/SALTMARSHWAY](https://SALTMARSHCPA.COM/SALTMARSHWAY)



*The Saltmarsh Way* is how we live out our firm's values. These 33 Fundamentals drive our extraordinary success and describe what to expect when working with us. From practicing 'blameless problem-solving' to being 'intensely curious' and delivering 'legendary service'. We love what we do and we want our clients to love working with us.

## OUR FAVORITES



### #24 BE POSITIVE

"Your attitude is contagious, so spread optimism and enthusiasm!"

-Darleen, Firm Administration



### #4 BE PRESENT

"I prefer to listen and get to know others!"

- Sarah, Financial Institutions



### #8 BE INTENSLEY CURIOUS

"I believe that learning something new is always beneficial!"

- Cade, Healthcare Consulting



### #6 PAY ATTENTION TO THE DETAILS

"We always triple-check our work and make sure we do it right the first time!"

- Maria, Audit & Assurance



### #28 BE A LIFELONG LEARNER

"Trying to learn something new has a positive impact on our well-being."

- Chris, Financial Advisory