



# Audit, Advisory, and Compliance Experts Driving Client Confidence.

At The Pun Group, LLP, we specialize in helping state and local governments, nonprofits, healthcare, transportation, manufacturing, and cannabis industries navigate complex financial challenges. Our experienced team offers a range of services designed to ensure compliance, drive operational efficiency, and support long-term success.

Our Services Include:

- **Government Audits:** Tailored audits to meet the unique needs of state and local governments.
- **Monitoring Services:** Ongoing oversight to maintain compliance and optimize performance.
- **Compliance Audits:** In-depth evaluations to help meet regulatory standards and mitigate risk.
- **Advisory Services:** Strategic guidance to improve financial operations, decision-making, and CAS services.
- **SOC Audits:** Comprehensive assessments to ensure secure and compliant financial systems.

With our deep industry knowledge and commitment to delivering customized solutions, The Pun Group is here to address your sector's distinct challenges—whether you're facing regulatory hurdles, expanding operations, or seeking expert advice.

Partner with us for reliable, tailored financial solutions that ensure your organization remains compliant, secure, and poised for continued growth.

## About us

- ✓ Founded 2012
- ✓ One of the fastest growing firms serving California, Nevada, Hawaii and Arizona
- ✓ One of the "TOP Accounting Firms" in Orange County
- ✓ Cal CPA Top 150 Firms
- ✓ 5-Year Diamond Award Winner – ClearlyRated "Best of Accounting" Client Satisfaction
- ✓ Top 500 Firms listed by INSIDE Public Accounting & Fastest Growing Firms



# Our Services

Our partners and seasoned professionals are always available to guide clients through periods of rapid growth and challenging times. We achieve this by offering a diverse portfolio of services tailored to meet the unique needs of each entity.

## ASSURANCE

- Financial statement audits
- Reviews and compilations
- Data compilations
- Financial forecasts and projections reporting
- Pro forma financial information reporting
- Compliance attestation
- Agreed-upon procedures
- Internal financial controls reporting
- Service Organization Controls (SOC) audits
- Employee Benefit Plan (ERISA) audits

## BUSINESS AND TAX

- Tax preparation
- Tax compliance
- Tax planning & strategy
- Bookkeeping
- Outsourced CFO services
- Labor law navigation
- Human capital solutions

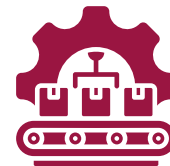
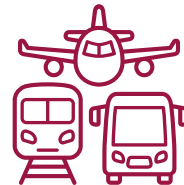
## ADVISORY

- Risk advisory services
- Financial restructuring & bankruptcy
- Litigation support
- Forensic investigation
- Corporate governance
- Business intelligence
- Due diligence
- Mergers & acquisitions
- Valuation

## Why The Pun Group?

- ✓ Big firm expertise with small firm values, always committed to your success
- ✓ A perfect blend of technical know-how with personal attention
- ✓ Embracing innovation
- ✓ Our professionals include CFOs and hold certifications such as CIA, CFF, CGFM, CPFO, and CGMA
- ✓ Rated Best of Accounting for Client Satisfaction in five key areas:
  - Quality
  - Value
  - Needs Understanding
  - Proactive Approach
  - Responsiveness

## Industries Served



CBA License: PAR 7601



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