

ABOUT WHITLEY PENN

Established in 1983, Whitley Penn has fostered an environment of excellence while encouraging entrepreneurial thinking. The firm has become one of the region’s most distinguished public accounting firms by providing exemplary service that reaches far beyond traditional accounting. We believe in working in collaborative teams without creating any barriers in communication with management. We learn, innovate, and succeed by sharing knowledge, embracing diversity, and working together.



Industries

- Agriculture
- Employee Benefit Plans
- Energy
- Estate Planning
- Family Office & Owned Business
- Financial Institutions
- Healthcare
- Manufacturing, Wholesale & Retail
- Nonprofit
- Private Equity & Alternative Investment Funds
- Professional Services
- Public Sector
- Real Estate & Construction
- Restaurant & Entertainment
- Technology
- Transportation & Logistics
- Veterinary Medicine

Services

- Audit
- Consulting
- Forensic, Litigation & Valuation
- Risk Advisory
- Tax
- Transaction Advisory



- (Wealth Management)



- (Outsourced Accounting Solutions)



Nexia International

Through our affiliation with Nexia International, Whitley Penn is able to achieve a global reach with individuals across the world. Nexia member firms are partner-led and dedicated to serving the best interests of clients regardless of the borders and boundaries in place. By working together, we can provide you with cross-border solutions tailored to you and your business.



Whitley Penn Talks Podcast

Whitley Penn's podcast channel serves as an outlet to regularly inform our listeners on issues and topics that businesses face. We aim to be viewed as thought leaders on a variety of topics involving accounting and business services as a whole. This podcast will be helpful and informative. Check out Whitley Penn Talks on your preferred podcast platform!



Austin | Dallas | Fort Worth | Hobbs | Houston | Midland | Odessa | Plano

Community Engagement

As a firm, we are dedicated to serving others and giving back to the community. We partner with many organizations and community outreach initiatives that directly benefit the communities in which we do business. We have professionals who hold board positions while others dedicate their time and resources. We will continue to serve our community in the same manner that we serve our clients – with sincere care and intent.

DEVELOP at Whitley Penn

This program was created to educate and encourage young professionals as they cultivate relationships and navigate a business environment.

The goal of the **DEVELOP** program is to:

- Provide opportunities to expand in leadership skills
- Network with peers
- Engage with firm leaders



When we make health and wellness a priority, we excel in both our personal and professional lives. Our wellness program, FitWhit, encourages team members to focus inward and make overall wellness a priority so that they can take better care of each other, their families, and their clients. FitWhit is dedicated to improving the physical and mental well-being of individuals by bringing healthy opportunities into our work environment.

Whitley Penn has been providing audit, consulting, and other services to governmental entities for over 30 years and we currently serve as auditors for more than 80 entities. Our partners have been recognized for their experience and regularly conduct seminars on various governmental accounting, auditing, and financial reporting topics for the Texas Society of CPAs, other CPA firms, the Texas Association of School Business Officials, Texas Municipal League, and the Government Finance Officers Association of Texas. Our experience provides us with a database of best practices that we can draw upon to provide our clients with the highest value in advice and recommendations.

Government Audit, Assurance and Attestation Services

- Audit of annual financial statements
- Federal and State Single Audits in accordance with the OMB Uniform Guidance and the State of Texas UGMS
- Preparation of Comprehensive Annual Financial Reports (CAFRs), and Annual Financial Reports (AFRs)
- Review of control environment, internal control structure and execution of controls
- Agreed-upon procedures for compliance and construction projects
- Fraud Investigations

Consulting and Advisory Services

- Cost Containment and Reduction Analysis
- Seminars and training involving the implementation of GASB pronouncements, the Uniform Guidance and other accounting, federal and statutory guidelines and procedures
- Internal controls and best practices advisory services
- Technical assistance with the latest in governmental accounting and reporting.



Whitley Penn has consistently been named among the top 25 firms in the country by *INSIDE Public Accounting*. We believe our success has been accomplished by focusing on the quality of our services and developing a quality team of professionals. Our culture of growth has allowed us to minimize professional staff turnover, which allows us to fulfill our commitment to staff continuity to our clients.