



Trusted advisor for 70+ Years

Tax Advisory & Compliance

Business Consulting

Audit & Accounting



Real Estate Industry Focus

For over 70 years, Shea Labagh Dobberstein (SLD) has worked with closely-held companies in the real estate industry to help their operations run more efficiently and profitably.

SLD offers insight, experience and efficiency to a wide array of clients in the real estate industry. Our Real Estate Services Group is well-versed in the entire lifecycle of real estate ownership - acquisition, development, operation, and disposition - and all types of real estate financing. Serving some of the region's largest real estate companies on their complex real estate deals provides staff with valuable insight that can provide clients peace-of-mind and stability in a dynamic marketplace.

A team of real estate advisors at SLD assists clients with complex tax planning, consulting and compliance issues. Clients can take advantage of our customized real estate tax minimization strategies to reach their unique financial goals and increase the value of their real estate holdings.

With SLD, you receive personalized service while benefitting from our team's experience. As a member of DFK International, an organization which offers access to other firms globally, SLD can address regional concerns and be a conduit to assisting clients scale and fulfill their strategic needs.

TAX ADVISORY AND COMPLIANCE

Our staff of highly experienced tax professionals can assist you with your advisory and compliance needs. We are uniquely equipped to provide our real estate clients with the following services:

- » Sophisticated tax planning to assist with debt restructuring
- » Tax-advantaged lease negotiation
- » Section 1031 like-kind exchanges
- » Federal, state and international tax preparation
- » Facilitation of cost-segregation and other valuation studies
- » Capital gains maximization strategies



BUSINESS CONSULTING

Shea Labagh Dobberstein will work closely with you to deliver key insight into your real estate business.

- » Consulting regarding complex partnership and multi-tiered investment structures



AUDITING AND ACCOUNTING SERVICES

In addition to a traditional audit function, our accounting and assurance team has expertise in testing an individual property's controls environment and in designing effective controls procedures. Our team is experienced in:

About Shea Labagh Dobberstein (SLD)

For over 70 years, SLD has uniquely positioned itself to help privately-held business clients grow by offering the resources of a national firm along with the personalized attention that only a regional firm can provide. Through our specialized expertise and dedicated service teams, clients have access to a spectrum of accounting, tax, audit and advisory services. Our broad portfolio of clients means clients can tap into a vast wealth of experience and industry knowledge. A member of the DFK alliance, SLD gives you access to resources around the globe.

Learn more at sldcpa.com.

- » Monitoring financial reporting
- » Analyzing variations in budget vs. actual results
- » Creating appropriate internal control systems
- » Reviewing operating/billing procedures relating to lease agreements, insurance, credit checks, etc.
- » Compliance relating to higher-level operations (i.e. property management agreements, incentive calculations)
- » Reviewing cash management



SHEA LABAGH DOBBERSTEIN
CERTIFIED PUBLIC ACCOUNTANTS & ADVISORS

SAN FRANCISCO | SAN MATEO | WALNUT CREEK
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