



COPELAND  
BUHL

# *We're Your Firm* for Life

More than an accounting and tax firm, we're your dedicated partners in success. With the expertise of a market leader and the personal touch of a close-knit team, we empower businesses and individuals to thrive.







## ROOTED IN RELATIONSHIPS

From humble beginnings to a leading accounting firm, the history of Copeland Buhl is a story of dedication, innovation, and client-focused service. Our story began in 1971 with founders Jim Copeland and Dennis Buhl and a simple focus: our clients. By prioritizing genuine relationships over rapid expansion, we've grown from their small partnership into one of Minnesota's most trusted CPA firms where **culture and values** remain at the heart of all we do.



# Welcome to Copeland Buhl

## *Your Firm for Life*

**Copeland Buhl is your enduring partner in growth.** As a top-20 Midwest accounting and advisory firm, we offer integrated approaches to take you where you want to go—whether you own an early-stage company, you're at the helm of a long-established business, or you're an individual looking to manage and grow generational wealth.

We believe meaningful client relationships drive meaningful results, and it all starts with open and consistent communication. This personalized level of service provides us a thorough understanding of your operations, as well as your aspirations and what might be holding things back. It's why our clients rarely leave—and why 96%\* would recommend us to others.

We believe true partnership means building relationships, staying proactive in an ever-changing marketplace, and delivering reliable advice and guidance to make a real difference. At Copeland Buhl, we're proud to be your CPA firm for life.

*\*Results from February 2024 client survey*

## Our Mission

Foster growth through caring and collaborative relationships.

## Our Vision

- Deliver high-quality, personalized, and value-added services.
- Be known as a difference-making regional firm by going deeper with our clients and providing actionable advisory insights with a practical approach.

“

Guidance that business owners can understand. Not an overly technical response on why they're providing the guidance, but guidance done in plain language that a business owner can digest.

”

## Our Values

- We are **collaborative**, drawing on team members' unique expertise and experience to develop solutions that are tailored to our clients' needs.
- We are in equal measure **passionate** about client-focused results and **caring** about the well-being of our team members and our clients.
- We are **engaged** and **authentic**.
- We are **unified** as we move toward our shared vision.
- We **empower growth** for our team members and our clients.
- We seek **practical, high-quality solutions**.
- We have **fun**.



# *Our Team is Here for You*

At Copeland Buhl, we hire the best and empower them to deliver the best



Our multidisciplinary, collaborative teams delve deep, identifying opportunities to maximize value through tax planning and preparation, audit and assurance, and accounting and advisory services.

Our dedicated research teams and subject matter experts proactively monitor legislative changes, meticulously analyzing proposed tax bills and tracking their progress. We translate these complex changes into actionable insights, giving our clients a clear understanding of how economic and political developments, tax code changes, emerging best practices, and other factors may impact their businesses.

Our team members go beyond traditional accounting to provide the personal advice and support our clients need to flourish. We're invested in our clients' success, both personally and professionally. That's why so many businesses and individuals trust us year after year.

## EXPERTISE IN YOUR INDUSTRY

Since 1971, Copeland Buhl has been providing the comprehensive, integrated solutions our clients need to move ahead in their industries.



- Construction & Real Estate
- Professional Services
- Healthcare
- Not-for-Profit
- Manufacturing & Distribution
- Restaurant & Retail
- Environmental



“Overall, we’re **extremely satisfied** with what they provide for us, the services as well as the job they do, the quality, from the bookkeeper to the partners.”

# Our Specialty Is You

We believe that understanding our clients on a personal level is paramount to providing exceptional service. This client-centric philosophy has enabled us to build concentrations of clients in three key areas:

## EMERGING BUSINESSES

Through practical tax planning and tailored accounting services, we help you navigate the complexities of growth. We deliver timely, relevant financial insights that empower you to make informed business decisions.

## MATURE BUSINESSES

We collaborate with you, your management team, and your professional advisors to offer strategic financial and tax planning, operational efficiency improvements, and comprehensive audit and assurance solutions.

## HIGH-NET-WORTH

Copeland Buhl is your steadfast guide for every phase of your life. Working seamlessly with your team of trusted advisors, we deliver strategic insights that align with your financial vision and help preserve your legacy.



# We're Your Firm for Integrated Tax Services

Bringing your overall tax picture into focus requires holistic and integrated planning. That's why sophisticated businesses and their high-net-worth owners rely on us for consistent, highly personalized business and individual tax planning and preparation. And though our firm has been providing comprehensive, integrated tax services in Minneapolis and the surrounding area since 1971, we don't rest on our laurels. We continuously deliver innovative tax expertise and strategic insights to optimize your tax position today and for the long term.



**BUSINESS TAX**

**TRUST, ESTATE & GIFT TAX**

**INDIVIDUAL TAX**

**STATE & LOCAL TAX**

**AUDITS, REVIEWS  
& COMPILATIONS**

**EMPLOYEE BENEFIT  
PLAN AUDIT**

**SOC**

**PEER  
REVIEW**

## Solid Assurance to Drive Your Business with Confidence

In today's dynamic business environment, you need more than just a look back. You need assurance to propel you forward. Copeland Buhl's audit and assurance services give your business and its stakeholders the foundation to grow with confidence. We keep your goals at the forefront as we leverage our expertise to deliver the assurance services that will meet your needs.

# A Coordinated Advisory Approach

We don't just offer advice; we work alongside you and your other advisors as a fully integrated support team.

We empower you to lead with absolute confidence by connecting the dots, challenging assumptions, validating your vision, and preparing you for what's next. The result is one cohesive strategy, not a collection of fragmented opinions.

**When you need decisive leadership and clear direction, you can count on us as part of your advisory team.**





# Committed to Your Business Success

Our accountants and business advisors provide modern accounting and advisory solutions that help move your business forward. With streamlined processes, clear communication, and a dedicated team, we ensure a smooth experience from initial consultation to ongoing support. That means you can focus on what matters most—your business. Our experienced team offers concierge-level service, tailoring solutions to your business and providing the clear, actionable insights you need to help you make informed decisions.

## OUTSOURCED ACCOUNTING

Supported by your Copeland Buhl outsourced accounting team, your business won't miss a beat. We offer an accounting framework that's efficient, reliable, and adaptable. From QuickBooks Online integration to advanced reporting tools, we have the systems to give you the information you need, when you need it.

## TRANSACTION ADVISORY

Mergers and acquisitions are capstone events in the lives of business owners. Copeland Buhl has provided transaction advisory services for hundreds of small and mid-sized businesses, helping business owners mitigate risks, seize opportunities, and turn their life's work into an enduring family legacy.

“

They're just the best at personalized service, responsiveness, and they always have an answer. They just go above and beyond.

”

# Financial Clarity for the Road Ahead

We stay ahead of the curve with what's trending in accounting and tax across the many industries we serve. We are committed to maintaining the highest level of expertise, and that means our leading experts are watching the latest legislative changes and business trends in your industry. Access our website library for key insights from subject matter experts on tax and accounting topics.

“

Out of sight, out of mind. I don't go to bed at night wondering whether we're covered.

”



**EXPERT GUIDANCE TO UNDERSTAND WHERE YOU'VE BEEN,  
MASTER THE PRESENT AND COMMAND THE FUTURE**





# *Our Caring Approach Translates to Client- Focused Results*

At Copeland Buhl, we're people first.

We know that our success hinges on the well-being and happiness of our team. We've built a close-knit environment where everyone feels valued, supported, and empowered to reach their full potential.

Our firm is dedicated to organic growth, and so our selective hiring process prioritizes a strong fit. We deliberately seek out smart, down-to-earth people who are passionate about client-focused results and eager to learn and grow.



# *Exceptional Professionals Build Life-Long Careers Serving You*

**At Copeland Buhl, our team is our greatest asset.**

We deliberately seek out smart, genuine people who share our passion for helping clients succeed. We value collaboration and a diversity of thought, knowing it's what keeps us innovative and at the top of our field.

The caliber of our team members is truly what makes us stand out.

We understand that mid-career professionals are looking for more than just a job. As a full-service accounting and advisory firm, we offer diverse roles, management positions, and a clear focus on upward mobility. We provide the tools, opportunities, and personalized support they need to advance their career, including robust leadership development programs and mentorship. Our goal is to help build their ideal career path right here.

For students just starting out, we offer a range of experiences to see the day-to-day life of a CPA firm. From semester-long internships to an immersive one-day program, Copeland Buhl attracts the best and brightest students looking to explore a career in accounting.



## *How Can We Help?*

We want to learn more about  
how we can partner with you to  
achieve your goals. **Let's talk!**



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