

ABOUT THE FIRM

GROCO is the trusted advisor to the highly successful. Our clientele include some of the most successful entrepreneurs in the Silicon Valley. We are long-term partners who carefully evaluate your financial and business objectives. We provide strategic and innovative solutions to positively impact your bottom line. Historically considered a premiere Bay Area accounting firm, GROCO has now been nationally recognized as one of the top 25 best managed CPA firms in the US by INSIDE Public Accounting.

Practical Accountant
PRACTICE PROFILE
Working With Those at the Top
Greenstein, Rogoff, Olsen & Co
By Stuart Kahan

Greenstein, Rogoff, Olsen & Co., in the San Francisco Bay Area, is currently run by Alan Olsen, managing partner, and Barry Rogoff, founding partner. Barry Rogoff passed away in 2002. The firm began operations in 1964 when Greenstein left Alexander Grant. Some of the initial clients were young venture capitalists who decided to follow him to that new practice. From that beginning, the firm had a strong foundation in the venture capital community.

Over the past few years, the firm noticed a considerable increase in the deal flow in Silicon Valley. "Since many firm clients were heavily involved in venture capital," says Olsen, "we recognized a substantial expansion of their personal wealth and thus, an increased demand for wealth-related services."

This past year, the firm experienced explosive growth in high technology and venture capital business with a 30 percent rise in gross billings. Today, the firm has clients throughout the Bay Area and beyond, serviced by three offices located in Fremont, Palo Alto, and San Francisco.

Hallmarks of Success

Focusing on the specific needs of high-net-worth individuals
ALAN OLSEN

Greenstein, Rogoff, Olsen & Co., CPAs
Advisors to the highly successful
Fremont, Calif.
Founded: 1964
Partners: 5
Of Staff: 53
Officers: 4
www.groco.com

PRACTICE BREAKDOWN

68%	Tax
27%	A&A
5%	MAS

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ALAN L. OLSEN, CPA, MBA (TAX)



Alan is managing partner at Greenstein Rogoff Olsen & Co., LLP. With more than 23 years of experience in public accounting, he works with some of the most successful venture capitalists in the world, developing innovative financial strategies for individuals and businesses.

Alan frequently lectures and writes articles about tax issues. He teaches accounting as a member of the adjunct faculty at Ohlone College and authored several books: Doing Business in the United States, Estate and Gift Tax Planning, and Fiduciary and Conservatorship Accounting: Duties of the Trustee.

Currently, Alan serves on President Kim B. Clark's* Advancement Council at Brigham Young University – Idaho. He also is a board member of the Washington Hospital Foundation, serves on the BSA Bay Area Council Board of Directors, and is involved with several other community foundations.

Alan earned a B.S. in Accounting from Brigham Young University, and an MBA (Taxation) from California State University at Hayward. In 2005, Alan was honored with an Alumni Public Service Award, recognizing his public service advancement. A recipient of the the Chairman's Award from the Fremont Chamber of Commerce and many other civic and public awards.

* Kim B. Clark served as the Dean of Harvard Business School, prior to joining BYU-Idaho.

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**GREENSTEIN, ROGOFF,
OLSEN & CO., LLP**

CERTIFIED PUBLIC ACCOUNTANTS

FREMONT

DANVILLE

PALO ALTO

SAN FRANCISCO



GROCO has built a strong team of professional advisors in the Bay Area. We focus on helping our clients achieve an ideal quality of life. We understand that personal time is important to our clients. We are committed to developing solutions which allow them to spend more time with their families.

SERVICES OFFERED

Individuals & Families

- Tax Planning & Preparation
- Bill Paying & Cash Flow Management
- Stock Option Planning
- Retirement and/or Business Succession Planning
- Financial Planning
- Tax Aspects of Investments
- Philanthropic Planning
- Estate & Trust Planning and Administration
- Financial Statements
- Banking & Credit Relationships
- Professionals in Transition Consulting
- Employee to Entrepreneur Strategies

Businesses

- Tax
 - Corporate, Partnership & Trust
 - Non-Profit Organization Returns
 - International & Multistate Tax Planning
 - Property Tax Returns
 - Shareholder Tax Issues
 - Payroll and Sales Tax Consulting
- Accounting & Auditing
 - Preparation of Financial Statements
 - Audits & Reviews
 - Cash Flow Analysis & Projection
 - Bookkeeping Services
- Financial & Strategic Management
 - Consulting Services
 - Start-up Company Planning
 - Compensation & Benefit Plans
 - Mergers and Acquisitions
 - Entity Restructuring
 - Research and Development Studies
 - Financial Consulting
 - Review of Contracts
 - Revenue Recognition Strategies
 - Employee to Entrepreneur
 - Business Plan Review
- Business Valuations
 - Ownership Related (ESOP, 409A, SAR)
 - Tax Related (Estate/Gift, FLP)
 - Transactions (Sales, Purchase, Acquisitions)



BEST MANAGED:

GROCO was honored by *INSIDE Public Accounting* as one of the top 25 best managed CPA firms in the entire nation.



BEST PLACE TO WORK:

The San Francisco Business Times named GROCO to their "Best Place to Work in The Bay Area" list.



FASTEST GROWING:

The San Francisco Business Times and Silicon Valley/San Jose Business Journal named GROCO to their "Fastest Growing Company" list.



STANDING OUT:

Robert Sher, principal of CEO to CEO, singled out Alan Olsen and GROCO for its outstanding marketing program and growth.



FINANCIAL PLANNING:

GROCO was recognized by CPA Wealth Provider as a winner of the national Financial Planning Award.



"GROCO's strong technical knowledge, integrity, and business expertise has been invaluable to me. My family and I have trusted our team at GROCO with both business and personal financial planning issues for over thirty years."

Tom Perkins
Kleiner, Perkins, Caufield & Byers

"GROCO has advised us with business solutions and tax strategies that have continually put us in a financially lucrative position. Unlike other firms, whenever I have a question, GROCO responds quickly with well-researched answers and valuable input."

Don Lucas
Sandhill Financial Group

GROCO is a full-service certified public accounting firm advising and assisting our clients with their accounting, tax, wealth preservation, financial and strategic planning needs. Whether you are a high net-worth individual seeking tax planning advice, a CFO seeking a partner to perform an annual audit or a professional in transition, Greenstein, Rogoff, Olsen & Co. has a team of highly experienced accounting, financial, and business planning professionals ready to assist you.

PARTNERS



Alan L. Olsen
CPA, MBA (Tax)
Managing Partner



Morey Greenstein
CPA
Founder



Steve Singer
CPA, MS



Ron Cohen
CPA, MS (Tax)



Hal Friedman
JD

Since 1964, our partners have advised hundreds of entrepreneurs in building their companies and preserving their wealth. Our clients participated in building companies like America Online, Oracle, Sun Microsystems, Compaq, Macromedia, and Genentech.

PROUD MEMBERS OF

