



MATTHEWS, CARTER & BOYCE
CPAs • ADVISORS

MCB MISSION
EMPOWER OUR CLIENTS **INVEST** IN OUR PEOPLE
EXCEED EXPECTATIONS

CLIENT TESTIMONIAL

CLARK ENTERPRISES

Client since 2008

Industry:

Private Investment Company

Services Delivered:

Tax Planning, Projections,
Tax Returns

“Matthews, Carter & Boyce has been a true partner in delivering results for us; they work collaboratively with our team and are not just a tax service provider.”

—James Brinkman,
Senior Vice President, CFO

CLIENT OVERVIEW

Clark Enterprises (“CEI”) is a privately-held investment company with extensive interests in real estate, private equity, and traditional investments. For decades, Clark Enterprises has been one of DC’s most trusted investment partners. Founded in 1972 by A. James Clark, the firm’s diversified portfolio has produced significant positive returns in a wide range of markets.

THE SITUATION

CEI Senior Vice President and CFO, James Brinkman, worked with MCB for several years in a previous role, prior to joining Clark. He was so impressed with the level of service he received from MCB’s tax professionals that he continued the relationship when he began his new role at CEI. For 10 years, MCB has provided key tax services related to CEI’s real estate interests with a level of understanding and responsiveness that has garnered a high level of trust. “We have a good, collaborative working partnership,” he said. “That’s important to us. We work directly with the top people in the firm.”

MCB IMPACT

When new tax laws take effect, the CEI team relies heavily on MCB to provide information and advice, and to be proactive in tax planning related to CEI’s real estate interests. This holistic approach — one that is not just focused during tax season — has been an effective complement to CEI’s overall financial strategy.

KEY RESULTS DELIVERED

Over the past decade, MCB has proven to be the best firm for CEI, delivering highly technical capabilities related to CEI’s real estate investments and quality that rivals the services of much larger, national firms, with highly personalized attention that is the hallmark of the MCB philosophy. MCB’s approach to client service makes this partnership a good fit, according to Brinkman, who adds “This is a great group of people to work with.”

703.218.3600 • www.mcb-cpa.com

12500 Fair Lakes Circle • Suite 260 • Fairfax, Virginia 22033

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