

# Top 11 Best Accounting Firms in Dallas, Texas

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## 2016 RANKING OF TOP ACCOUNTING FIRMS

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### **Finding the Top Accounting Firms in Dallas, Texas**

While living in the always bigger and usually better Dallas, Texas area has many advantages, finding an honest and reputable accounting firm in Dallas can also be a challenge!

There are thousands of accounting firms and CPAs in Dallas, all eager to get your business. However, before you choose a Dallas CPA, you should get answers to a few very important questions first!

What kinds of services do Dallas CPA firms offer? How do these accounting firms in Dallas set their fees? What kinds of clients do they serve?

These are all important factors to consider and your answers should be a valuable part of the process as you decide which Dallas accounting firm may be best for you.

Yet, who has the time to pour through seemingly endless information offered by thousands of accounting firms in Dallas? Not to mention the time it would take to apply important selection criteria to each of them? Well, we do of course!

As you read on, you'll discover how AdvisoryHQ has developed a top-down selection methodology to pin down the best Dallas CPAs and accountants in the area.

We've made our selections carefully and have compiled them all here in our review of the top 11 best accounting firms in and around Dallas, Texas. Enjoy!



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## AdvisoryHQ's List of the Best Accounting Firms in Dallas, Texas

- [Beaird Harris & Co.](#)
- [BKM Sowan Horan](#)
- [Goldin Peiser & Peiser, LLP \(GP&P\)](#)
- [Hein & Associates, LLP](#)
- [Huselton, Morgan, & Maultsby \(HM&M\)](#)
- [McKinnon Patten](#)
- [Montgomery Coscia Greilich, LLP \(MCG\)](#)
- [Salmon Sims Thomas](#)
- [Saville, Dodgen, & Company, LLC](#)
- [TravisWolff, LLP](#)
- [Whitley Penn, LLP](#)

*List is sorted alphabetically (click any of the names above to go directly to the detailed review section for that firm)*

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- *Can Accounting Firms Request Corrections & Additions to Their Reviews?*

## Top 11 Accounting Firms in Dallas, Texas

<b>Firm</b>	<b>Location</b>
Beaird Harris	Dallas
BKM Sowan Horan	Addison (Right outside Dallas)
Goldin Peiser & Peiser, LLP (GPP)	Dallas
Hein & Associates LLP	Dallas
Huselton, Morgan & Maultsby (HM&M)	Dallas
McKinnon Patten	Dallas
Montgomery Coscia Greilich LLP (MCG)	Dallas
Salmon Sims Thomas	Dallas
Saville, Dodgen & Company, LLC.	Dallas
Travis Wolff, LLP	Dallas
Whitley Penn LLP	Dallas

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## Methodology for Selecting Accounting Firms in and around Dallas, Texas

What methodology did we use in selecting this list of best accounting firms in and around Dallas, Texas?

Using publicly available sources, AdvisoryHQ identified a wide range of accounting firms in Texas that provide services in Dallas and surrounding areas.

We then applied AdvisoryHQ's "Breakthrough Selection Methodology" to identify the final list of top accounting firms that provide services to communities in and around Dallas, Texas.

Click here for a detailed review of our methodology: [Methodology for Selecting Top Accounting Firms](#).

## **Detailed Review – Top Ranking Accounting Firms in Dallas, Texas**

Here, you will find detailed reviews of each Dallas CPA that has been selected for our list of the top accounting firms in and around Dallas, Texas. We have highlighted some of the factors that allowed these accounting firms to score so highly in our selection ranking.

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### **Beaird Harris & Co. Review**

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Founded in 1988 by Pat Beaird and Don Harris, [Beaird Harris & Co.](#) is a Certified Public Accounting (CPA) firm located in Dallas, Texas.

They offer tax, accounting, and consulting services to high net-worth individuals, families, business owners, and healthcare professionals across Northern Texas.

In addition to their CPA firm, the company began operating Beaird Harris Wealth Management, Inc., a fee-only wealth management firm, in response to their clients' overwhelming need for quality, unbiased investment advice.

#### **Key Factors that Enabled This Firm to Rank as a Top 2016 Accounting Firm**

The following is a listing of key factors that allowed Beaird Harris & Co. to rank as one of 2016's top 11 accounting firms in Dallas, Texas.

##### The Industry Advantage:

Extending services to a variety of high net-worth clients allows BH & Co. to better understand the unique needs of the people they serve.

Let's take a brief look at just some of those who may best benefit from services offered through BH & Co.:

- Foundations
- Consultants
- Attorneys
- Entrepreneurs
- Sales executors
- Airline pilots
- Foundations
- Retirees
- University professors
- Estates & trusts
- Business owners
- Construction Industry
- Restaurant franchises
- Information technologists
- Healthcare professionals
- Real estate professionals

#### Tax Advantaged Services:

Taxes are one of those things that can feel, to put it lightly, daunting. And confusing. BH & Co. understands your apprehension, and they come prepared with decades of experience in handling all types of tax and accounting issues.

They combine innovation with trusted services in order to build a strong and successful relationship with each client.

When it comes to tax, estate, and compliance planning, BH & Co. is an expert in just some of the following areas:

- Federal and state tax preparation
- Tax projections
- Gifting and charitable planning
- Wealth and property transfers
- Trusts and family limited partnerships
- Retirement planning
- Multi-year strategies
- Lease vs. buy analysis
- College tuition planning
- Transaction advice and structure

- Tax and financial consulting for divorce
- Proactive tax planning
- Payroll tax reporting
- Texas margin tax
- Budget development
- Account reconciliations
- IRS representation

### A Healthcare Advantage:

BH & Co. specializes in meeting the prestigious demands of those in the healthcare field. From tax and accounting to consulting services, the firm works with practices large and small.

A sampling of healthcare clients includes:

- Endodontists
- General, plastic, and oral surgeons
- OBGYNs
- Orthodontists
- Dentists
- Physicians
- Urgent care facilities
- Surgery centers
- Hospitals
- Medical groups
- Emergency medicine
- Management service organizations

When it comes to tax planning, compliance, and accounting services, BH & Co. is well versed in today's regulatory requirements facing healthcare professionals.

They know how to handle complex tax laws and the ever-changing costs these requirements represent. All services outlined in the "Tax Advantaged Services" apply to healthcare clients, as well as:

- Startup and acquisition services
- Entity selection
- Structuring for corporations, partnerships, and LLC's
- Debt management
- Selection and setup of computer software

- Multiple company structure issues
- Cost segregation maximization
- Cash and accrual basis decisions
- Employee compensation structuring
- Plan selection
- Tax implications
- Benefit structuring
- Total wealth management

### Tools to Learn and Grow by:

Knowledge is a powerful tool that can help you and your accountant stay on top of your finances and make excellent decisions when it comes to protecting what you've worked so hard for.

BH & Co. offers a suite of tax and financial tools, links, and information to both clients and non-clients alike.

Anyone interested can take advantage of these free resources to gain a better understanding of their finances. Certainly something to be taken advantage of.

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## **BKM Sowan Horan Review**

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As a full-service public accounting firm operating out of Addison, Texas, [BKM Sowan Horan](#) extends a collaborative business environment to clients through audit, tax, and consulting services.

Areas of special interest include privately-held companies, SEC-registered entities, employee benefit plans, and non-profit organizations.

### **Key Factors that Enabled This Firm to Rank as a Top 2016 Accounting Firm**

Below, please find a listing of key factors that helped BKM Sowan Horan to be rated as one of 2016's top 11 accounting firms in Dallas, Texas.

#### Client Sector Diversity:

BKM says they are often asked by prospective stakeholders what their professional taxing and audit experience is within a particular industry.

Potential clients are usually happy to find that the firm has a knowledgeable and experienced staff specializing in a variety of sectors. This includes the following:

- Natural resources
- Construction
- Financial services
- Hospitality
- Manufacturing and distribution
- Not-for-profits
- Professional services
- Healthcare
- Real estate
- Settlement trusts
- Technology

#### Intuitive Service to Meet Your Needs:

A close partnership is based on clear communication, timely service, and a positive impact on your business.

BKM continues to supercede expectations for clients and builds trust through collaborative efforts that serve public and private companies ranging in size from **\$10 million to \$4.5 billion**. Areas of special interest include, but are not limited to:

- International tax services
- Transaction advisory
- Financial statement audit
- Federal tax services
- State and local tax services
- Expatriate tax
- Internal audit
- Cost segregation
- Estate planning & tax compliance
- Construction cost audit
- SSAE 16/SOC 1, 2 and 3
- Business valuations
- Accounting services



- Mergers and acquisitions

### A Common Mission:

BKM firmly believes in the closely held values that allow them to be a cornerstone in their clients' futures. With "competence, confidence, and caring," the following is a summary of BKM's mission:

- They seek to offer change in the lives of both their clients and their staff
- The interest of the client is above all else
- The firm will always act responsibly when challenges arise
- They will choose appropriate solutions for their client and create long-lasting relationships
- They will aspire professionally with their "three Cs" in mind

### Professional Affiliations:

BKM proudly boasts a partnership with Kingston Sorel International (KSi), a corporation with [over 150 offices in 60 countries](#).

This alliance truly expands the firm's global reach and fulfills the increasing international needs of BKM's clientele.

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## Goldin Peiser & Peiser, LLP Review

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Located right in Dallas, Texas, [Goldin Peiser & Peiser, LLP](#) was founded in 1994 by 3 founding partners. Since then, they've grown steadily to [over 50 team members and nine partners](#), offering cutting-edge accounting, tax, and advisory solutions to personal and business finance clients.

Additionally, GP&P has been named the [20th largest CPA firm](#) in North Texas by the Dallas Business Journal.

### **Key Factors that Enabled This Firm to Rank as a Top 2016 Accounting Firm**

The following is a list of the major points that allowed Goldin Peiser & Peiser, LLP to rank as one of 2016's top 11 accounting firms in Dallas, Texas.

### The Industry Advantage:

GP&P prides themselves on building a practice based on industry focus. Each area of specialization is managed by a team of experts in that field who understand the nuances your particular business faces.

As a strategic partner, they can help your business thrive. The following is a list of industry specialities at GP&P:

- Real estate/construction services
- Medical services
- Dental services
- Manufacturing and distribution services
- Oil and gas services

### An Overview of Services:

In an effort to maintain the best interest of their clients at all times, GP&P takes a holistic approach that evaluates all aspects of your business.

When the picture is seen as a whole, a more logical strategy can then be applied to boost financial success with the following services:

- Employee benefit plan audit (EBP)
- Accounting/financial services
- Business valuation services
- Transfer pricing
- Tax services
- CFO advisory services
- State and local tax (SALT) services
- Wealth management
- Audit and assurance services
- Fraud prevention, investigation, and litigation support services
- IRS help: representation and defense

### A Diversely Effective Team:

As we mentioned, GP&P has grown to over 50 team members working hard for their clients, and a leading group of nine firm partners.

An additional variety of principals, directors, managers, senior associates, and other staff gives the firm a world-class advantage when it comes to serving

diverse needs and offering insightful, team-oriented strategies to objectively help clients reach their goals.

### Independently Invested:

As an independent member of the BDO Alliance USA, a nationwide network of independently owned accounting, consulting, and service firms, GP&P onboards necessary tools and research for their clients, including the following:

- Enhanced client services
- Expanded domestic and international reach
- Greater technical knowledge
- Professional experience in a wide range of industry settings
- Access to leading technical information
- Inclusion in state-of-the-art computer systems
- Key contacts and sophisticated professionals

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## Hein & Associates, LLP Review

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For more than 30 years, [Hein & Associates, LLP](#) has been serving both private and public companies through their four office locations in Denver, Dallas, Houston, and Orange County, Texas.

Clients fall into a wide-range of categories and receive the same high level of tax, audit, and advisory service whether they are small, mid-sized, large, national, or global entities.

### **Key Factors that Enabled This Firm to Rank as a Top 2016 Accounting Firm**

Read on for a listing of essential factors that enabled Hein & Associates, LLP to rank as one of 2016's top 11 accounting firms in Dallas, Texas.

### The Industry Advantage:

Hein & Associates' long-standing presence in the oil and gas industry has earned them a superior reputation, as has their strong presence when facing a multitude of issues with manufacturing and distribution companies.

No matter what lies ahead, the team at Hein & Associates has the expertise and industry knowledge needed to serve clients in the following sectors:

- Energy
- Technology
- Real estate and construction
- Private equity
- Manufacturing and distribution

#### Audit and Assurance Services:

Hein & Associates offers reliable audit and assurance services that can be an essential part of a company's credibility. The firm offers independent verification and reliable information in some of the following areas:

- Historical or anticipated performance
- Internal control systems and processes
- Break-even analysis
- Non-financial performance or condition information
- Behavior information
- Reporting on financial forecasts and projections
- Compliance attestation
- Service organization reports (SSAE 16/SAS 70)
- Agreed-upon procedures engagements

#### Tax Efficient Services:

Minimizing taxes and creating simplicity in a complicated environment are just an example of Hein & Associates' approach to efficient tax strategies.

The firm is committed to digging deeper and addressing cross-border issues that can negatively impact a business. Specialized tax services include, but are not limited to:

- Tax implications of internal transactions
- Tax nuances of a particular business
- Tax impacts of locating in another state
- Individual tax situation review and planning
- Family business planning succession

#### Advisory Services for Your Business:

Hein & Associates' business advisory professionals are leaders in their field. Comprehensive business solutions serve to enhance a company's growth, position them more favorably in the market, and ultimately, render more profitability.

All this and more can be achieved through a guided approach that encompasses one or more of the following services:

- Internal audits
- Cloud solutions
- Adaptive insights implementation
- Joint venture audits
- Internal control assessment/SOX 404
- Valuation services
- Cyber risk
- Transaction advisory services
- Service organization control (SOC) reports/SSAE 16

#### Outsourced Accounting Services:

Save a lot of time and tedious labor through Hein & Associates' outsourced accounting services. A customized approach is offered to companies big and small, foreign and domestic, with an integrated focus on people and technology.

Alongside their affiliated partnership with Prime Global offices, clients can take advantage of the following outsourcing services:

- Part-time and temporary controllership
- Recurring bookkeeping, payroll, and tax preparation services
- Fixed asset tracking
- U.S. and global tax compliance
- Accounts clean-up and reconciliation
- Preparation of financial reports

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## **Huselton, Morgan, & Maultsby, LLP**

### **Review**

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Huselton, Morgan, & Maultsby, LLP (HM&M) is a group of certified public accountants offering tax, audit, accounting, and consulting services. Their offices are strategically located in Dallas and Fort Worth, Texas in order to reach a substantial variety of clients in this metropolitan area.

HM&M was established in 1978 and has recently been named the **16th largest accounting firm** in the Dallas/Fort Worth area by the Dallas Business Journal.

### **Key Factors that Enabled This Firm to Rank as a Top 2016 Accounting Firm**

The following is a key list of factors that allowed Huselton, Morgan, & Maultsby, LLP to be ranked as one of 2016's top 11 accounting firms in Dallas, Texas.

#### Driven by Core Values:

At HM&M, they are proud of a lot of things. Their staff, their dedication, their professional drive. These are things that are taken into account on a daily basis and, along with the following list of core values, remain a driving force in all they do:

- Professionalism
- Responsiveness
- Integrity
- Mutual respect
- Quality work

#### Comprehensive Audit Solutions:

A wealth of experience in a variety of industries allows HM&M to offer strategic audit and tax services to a wide array of businesses.

From basic tax preparation, to sophisticated tax strategies, to accounting and outsourced CFOs, there is almost no end to what 35 years of professional industry experience has prepared HM&M for. Here's a look at some of the main industry sectors served by the firm:

- Healthcare
- Oil and gas
- Construction

- Real estate
- ERISA
- Individuals and families
- Not-for-profit organizations
- Retail companies
- Manufacturing

#### An Overview of Tax Services:

The complex nature of taxes can sometimes be a great challenge, especially during times of change or transition. HM&M understands tax laws and regulations and how they may apply to a client's specific situation.

With a focus on minimizing taxes, HM&M offers the following tax services:

- Tax planning
- International tax
- Sales tax services
- Federal and state tax controversy representation
- Estate and gift planning
- Business entity selection
- Tax preparation

#### Accounting at a Glance:

HM&M can offer clients a comprehensive accounting "package" that will hone in a specific client's business and allow for seamless, flexible, and reliable financial reporting and accounting.

They achieve these coveted results through some of the following services:

- Financial statements
- Cash flow and budgeting analysis
- Accounting services
- Bookkeeping/write-up
- Financial forecasts and projections
- Payroll services
- Compilation

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**McKinnon Patten Review**

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Located in Northern Dallas, Texas, [McKinnon Patten](#) is a certified public accounting firm focused on excellent service backed by an honest, client-centered team.

They offer strategic financial solutions, full-service accounting services, and business consulting on various levels. Services are tailored for both local businesses and individuals with varied tax and accounting needs.

### **Key Factors that Enabled This Firm to Rank as a Top 2016 Accounting Firm**

What follows is a listing of contributing factors that allowed McKinnon Patten to be chosen as one of 2016's top 11 accounting firms in Dallas, Texas.

#### The Industry Advantage:

McKinnon Patten serves a variety of industries and has been doing so for over 40 years. Their “big four” expertise allows them to apply proven strategies to businesses ranging from small, family-owned stores to large, industry-leading corporations.

The following is an overview of industry sectors in which McKinnon Patten specializes:

- Oil and gas
- Agribusiness/farms
- Entrepreneurial businesses
- High net-worth individuals
- Real estate
- Private equity and investment partnerships

#### Business Consulting at Its Finest:

Through a hands-on approach, McKinnon Patten begins with you—the most important piece of the puzzle.

They know you understand your business better than anyone, and they work tirelessly to ensure that they understand your business as well.



Only then can they make appropriate recommendations and offer insights into your company that can help your business thrive in a tough market. Business consulting services include:

- Litigation support and expert witness
- Business valuation
- Fraud and forensic services
- Mergers and acquisitions
- Succession and shareholder planning

### Tax Efficient Planning and Compliance:

When it comes to taxes, McKinnon Patten remains abreast on ever-changing rules and regulations that can affect any given tax strategy. Good tax planning is a critical component of the financial health of a business or individual.

### Audit and Assurance Expertise:

Audit and assurance services through McKinnon Patten go way beyond basic documentation and numbers.

With a wide-range of services tailored to your specific needs, the firm guarantees objective insight, analysis of your business, and an optimization plan to improve internal controls.

### Request a Consultation:

If McKinnon Patten sounds like a CPA firm that may fit your financial needs, you can contact them free of charge for a consultation.

This can be done through email or by phone and is an excellent way to get answers to any questions that may be standing between you and a successful financial future.

Whether your needs are great or small, a suite of tax minimizing strategies awaits you.

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## Montgomery Coscia Greilich, LLP Review

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The team at [Montgomery Coscia Greilich, LLP](#) (MCG) will strive to be a significant part of your everyday life.

As a full-service accounting firm with offices in Austin, Fort Worth, and Dallas, they offer more than just accounting, tax, and assurance services.

MCG has cultivated their expertise to include financial advisory, transactional advisory, and strategy and management consulting services to their repertoire as well.

### **Key Factors that Enabled This Firm to Rank as a Top 2016 Accounting Firm**

The following is a listing of key factors that allowed Montgomery Coscia Greilich LLP to rank as one of 2016's top 11 accounting firms in Dallas, Texas.

#### Core Values on Display:

Creating an environment which promotes unique growth opportunities for both clients and staff, MCG has outlined a set of core values which help them to meet the challenges that businesses face regularly.

#### Comprehensive Services:

As a nationally-ranked top accounting firm, Montgomery Coscia Greilich offers value-added services and a competitive fee structure to accompany outstanding service.

Below, we'll take a brief look at services offered through the firm:

- Audit and assurance
- Financial statement audit and assurance
- Employee benefit plan audit
- Internal controls and SAE 16 audit
- Tax planning
- Federal and state compliance
- Tax counseling
- IRS and state audit representation
- Sales and use tax
- Compliance and consulting
- Audit representation
- Financial advisory

- Business advisory
- Strategy and management consulting
- Transaction and capital advisory
- Valuation

### Ranking Against the Competition:

MCG's success can be attributed to many things, including their dedication and complete commitment to their clients.

With clear focus and professional esteem, the following is a look at how Montgomery Coscia Greilich ranks against its competitors:

- #1 in *INSIDE Public Accounting's* 2015 Fastest Growing Firms
- #1 in *Accounting Today's* 2015 Fastest-Growing Firms under \$100MM
- #3 in *Accounting Today's* 2015 Fastest-Growing Firms
- #3 in *Accounting Today's* 2015 Top Southwest Firms
- #80 in *Accounting Today's* 2015 Top 100
- #80 in *INSIDE Public Accounting's* 2015 Top 100
- *Addison Magazine's* 2015 Reader's Choice Favorite Accounting Firm

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## Salmon Sims Thomas Review

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Serving privately held businesses and individual clients, [Salmon Sims Thomas](#) (SST) has built a 25-year reputation of client-centered service excellence.

Their offices are located in both Darlington and Dallas, Texas, through which they offer tax, audit, and business advisory solutions. Additionally, SST is a founding member of INTEGRA International, a global association of independent firms. This alliance allows them professional reach to over 90 independent organizations.

### **Key Factors that Enabled This Firm to Rank as a Top 2016 Accounting Firm**

What follows is a list of important factors that enabled Salmon Sims Thomas to rank as one of 2016's top 11 accounting firms in Dallas, Texas.

### Specializing Their Craft:

SST serves a wide-range of clients, and not all may fall into the categories listed below.

However, led by expert partners and managers, the industry specializations created by the firm allow for a holistic approach and exclusive insight into delicate matters that affect these industries the most. They are:

- Family-owned businesses
- Career schools and colleges
- Non-profit organizations
- Employee benefit plan audits

### Comprehensive Client Solutions:

SST prides themselves on successfully fostering relationships with clients, some of which have lasted more than 20 years. Their team is prepared to offer expert knowledge and unmatched support in the following service areas:

- Tax services
- Audit and attest services
- CFO/Controller
- Business advisory services
- Peer review services
- Estate and retirement planning
- Cloudkeeping outsourced solutions
- Retirement and estate planning

### A Skillful Tax Approach:

Tax services from SST offer the reach of a massive organization while maintaining the sensibility of a small firm. This balance serves clients well and allows for a personal approach without limits.

Below, we will take a look at expert tax services available through SST:

- Tax planning
- Tax controversy
- Preparation of tax returns
- Representation before the IRS
- Tax projections

- Transaction planning
- Tax compliance reviews
- Estate and retirement planning

### Mission and Core Values:

The success of their clients is a top value for SST. To ensure that all avenues are open in taking a strategy from the planning stage to reality, the firm has outlined the following core values:

- Integrity and honesty
- Continuous improvement
- Long-term perspective
- Teamwork and relationships
- Service to others before self

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## Saville, Dodgen & Company LLC Review

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Saville, Dodgen, & Company is a Dallas-based firm built upon a sincere belief in faith and values. Since 1965, Saville has been working to help clients maximize their bottom line, whether they are small entrepreneurs or large, global corporations.

### **Key Factors that Enabled This Firm to Rank as a Top 2016 Accounting Firm**

Below we have listed qualifying factors that allowed Saville, Dodgen & Company, LLC to rank as one of 2016's top 11 accounting firms in Dallas, Texas.

### Adapting to Market Needs:

Saville boasts both depth and breadth in their everyday services. The team has withstood the test of time, and along the way, they've garnered immeasurable expertise when it comes to serving the needs of specialized clients.

As such, they've honed their practice to not only meet but exceed these needs and serve the following markets:

- Manufacturing and distribution
- Construction
- Law
- Real estate
- Oil and gas
- International
- Professional sports
- Non-profit organization

### Quality Service, Quality People:

An organization is only as strong as the members within it. Without a knowledgeable and professional team, it would be impossible to build successful, trust-filled relationships.

Delivering the highest quality in an ever-changing market is also important to Saville, and they proudly offer the following services:

- Business advisory
- Assurance
- Estate and gift planning
- Tax compliance
- Information technology
- Tax planning and advisory
- Outsourced accounting
- Retirement plan administration
- Professional services

### Affiliations and Acknowledgements:

Through the years, the work of Saville has certainly not gone unnoticed.

They have earned praise for their strategic service developments and formed important partnerships with affiliated companies to further their professional reach. Here's a look at what they've achieved:

- Top 25 Accounting Firms in Dallas/Fort Worth, past 7 years – *Dallas Business Journal*
- Best Accounting Firm to Work For, 2011, *Accounting Today*
- Affiliate of [Allinial Global](#), a global network of 300 independent accounting firms in over 125 countries

### Giving Back to the Community:

Saville strongly believes that giving back to the community is the right thing to do. Each year, the firm takes on two community causes, and together with their staff, they work hard to make a difference.

Below is a sampling of causes Saville has been involved with over the years:

- Buckner's Children's Home
- Nexus Recovery Center
- Susan G. Komen
- Need Him Ministries
- Boy Scouts of America
- North Texas Food Bank

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## TravisWolff, LLP Review

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TravisWolff, LLP is a group of independent advisors and accountants located in North Dallas, Texas. The firm began operating in 1991 and has since grown to offer a full-range of tax, assurance, and consulting services.

Services are tailored to successful individuals, families, as well as established and emerging companies.

### **Key Factors that Enabled This Firm to Rank as a Top 2016 Accounting Firm**

The following is a listing of key factors that allowed TravisWolff, LLP to rank as one of 2016's top 11 accounting firms in Dallas, Texas.

#### A Newcomer's Advantage:

Few things are perhaps as uncertain and frightening as starting a new business. Regardless if the aim is large or small, TravisWolff can offer amazing growth and establishment opportunities to new and emerging companies.

From building portfolios and raising capital to developing supplier relationships, the TravisWolff team has the tools and expertise you need.

Here's a look at available services:

- Benefit and compensation planning
- Tax services
- Financial statement review
- Business and transaction advisory services
- Qualified plan design
- Growth planning
- Entity formation

### Serving Families and Individuals:

Successful families and individuals need more than just accumulation and protection of wealth.

A variety of implications over the years necessitates a keen sense of direction and understanding of the unique challenges ahead.

For this reason, TravisWolff has designed a suite of services aimed at helping families and individuals in the following ways:

- Estate planning
- Complex tax strategy
- Income shelter
- Wealth planning
- Transaction services
- International tax counseling
- Wealth accumulation, protection, and transfer
- Tax services
- Collaborative divorce

### In The Know:

[In The Know](#) is the blog at TravisWolff's website, and it is a great source of information for anyone interested in broadening their knowledge database.

When being an active participant in your finances is important, In The Know will keep you informed about important economic changes, as well as news specific to the firm itself.

### A Moore Stephens Affiliate:

TravisWolff is an independent firm associated with Moore Stephens International Limited, a global network of [307 independent accounting and consulting firms](#), with [667 offices in 105 countries](#).



This depth of knowledge and technical reach equates to that offered by “big four” firms. Certainly a benefit to TravisWolff’s clientele.

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## Whitley Penn, LLP Review

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Established in 1983, [Whitley Penn, LLP](#) offers many services such as audit, tax, litigation, risk advisory, and financial services.

These services are available through four easily accessible locations throughout Texas including Dallas, Houston, Fort Worth, and Texas City.

### **Key Factors that Enabled This Firm to Rank as a Top 2016 Accounting Firm**

Next is a list of key factors that made it possible for Whitley Penn, LLP to rate as one of 2016’s top 11 accounting firms in Dallas, Texas.

#### Focused Industry Specialization:

Whitley Penn’s experienced staff offers unparalleled industry specialization and a hands-on ethic which narrows a broad focus down to a small niche sector.

This enables the team to stand by clients in a variety of industries, mitigating challenges as they come. Let’s look at Whitley Penn’s areas of focus:

- Public sector
- Energy
- Estate planning
- Employee benefit plans
- Professional services
- Technology
- Non-profit
- Family office and owned business
- Financial services
- Healthcare
- Retail, restaurants, and entertainment
- Professional services

- Manufacturing and distribution
- Real estate and construction

### Beyond Tradition:

Whitley Penn offers traditional services such as corporate tax, audit work, and accounting. However, they know many clients just need more.

To meet this demand, they have curated the following list of in-depth services:

- Financial consulting
- Business appraisals
- Business advisory services
- Litigation and forensic services
- Business valuation
- Tax and consulting
- Virtual back office
- Transactional advisory services
- Risk advisory services

### Whitley Penn Financial:

In 2000, Whitley Penn expanded their practice and created [Whitley Penn Financial](#), LLP, to offer a whole new set of financial advisory services to clients.

This new expansion allows for more comprehensive tools for clients to accumulate, grow, and preserve their wealth.

If you are interested in advanced financial management, the following is an overview of services Whitley Penn Financial offers:

- Retirement planning
- Asset management
- Qualified retirement plans
- Estate planning
- Insurance services

### An Affiliated Firm:

Whitley Penn is a proud affiliate of Nexia International, a leading worldwide network of independent accounting and consulting firms. Through this elite partnership, they work together to offer:

- Local expertise with access to a global network
- Seamless services
- A cost-effective approach
- Consistent quality and the highest standards
- A proven track record

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## **Conclusion – Top 11 Accounting Firms in Dallas, Texas**

Now that you've had the opportunity to take a deeper look into some of the best accounting firms in Dallas, hopefully you are feeling excited about the future.

Out of the 11 Dallas CPAs we've chosen to represent our list of the top 11 accounting firms in Dallas, Texas, there is a good match out there for you.

So what's the next step? Something we encourage as you narrow down your search is to take inventory of your specific needs.

Are you searching for services as an individual or as a business owner? Are your needs basic and leaning toward accounting, tax, or bookkeeping?

Do your needs cross over into a more complex world of litigation, business advisory, and international tax?

By assessing your needs, you can more easily match those needs up with an accounting firm in Dallas that is perfectly suited to take on your specific challenges.

Lastly, stand confident. You have worked hard to get to where you are, and as you move into a new stage of finance, we hope our assessment of the best accounting firms in Dallas has helped to start you off.

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If you have questions, comments, or tips about this "Top 11 Accounting Firms in Dallas, Texas" article, send us an [\*\*email\*\*](#).

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Cheers,  
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