



PATTON ARCHER

**Enhance your services.
Elevate client experiences.**



Synergy Beyond Simple Figures

Empowering Firms, Enriching Futures

Too often, CPA firms witness a gap between their clients' tax planning and investment strategy. The bridge? Outsourced investment management and valuation expertise from the companies of Patton Archer Corporation. By merging expertise, clients get more than financial advice. They get a roadmap to a more secure future. And you substantially grow your business.

Plans of Action

We worked with a CPA to help him get the Series 65 exam and then put into place a repeatable action plan to add investment management clients that required very little time on his part, bringing \$30 million in assets to his firm over the next 10 years.



Having a true back office who does all the paperwork, billing, investment management, rebalancing is a difference maker. **Now we can focus on client relationships and have gone from \$4 million to \$80 million since joining the Patton Archer team.**

- A Valued Partner



Our Mission

To serve the Accounting Community Practitioner with respect and integrity while helping them put their client's first.

Setting You Up for Success



Partners, Not Competitors

We value the relationship CPAs have with clients and strive to strengthen it.



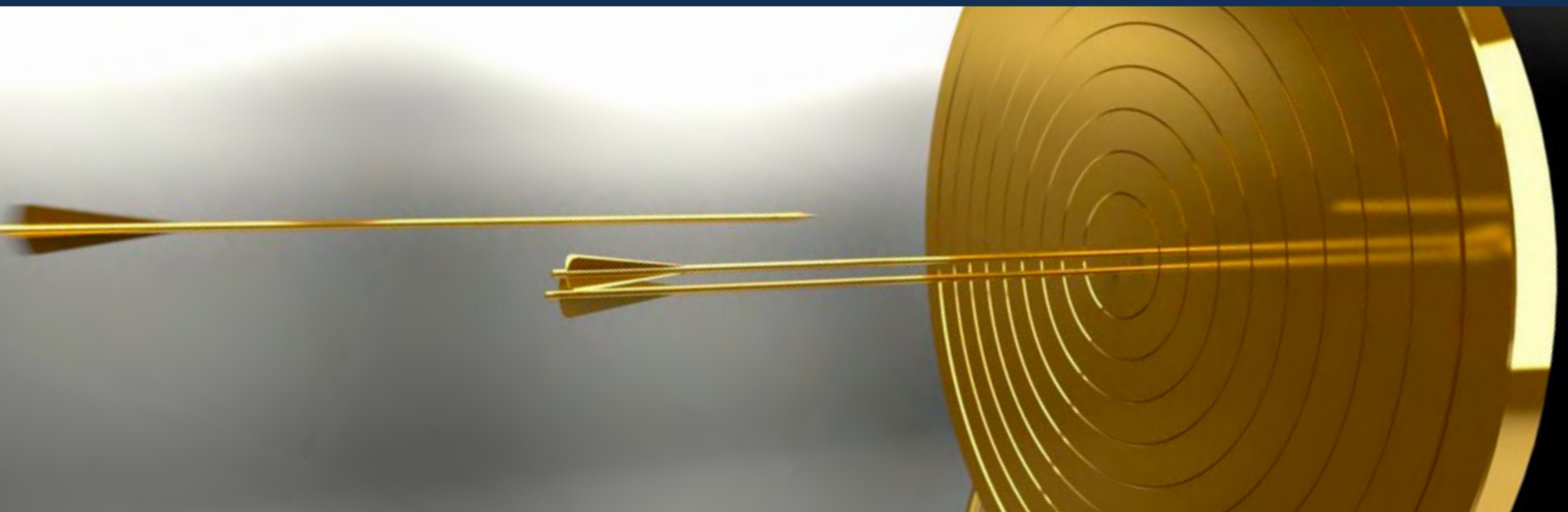
Alignment Over Isolation

Integrate tax planning with investment strategy for a clear, holistic client approach.



Enhanced Capabilities

We equip your firm with resources that expand your service range without the overhead.



Amplifying Your Expertise

Outsourced Solutions for CPAs

Investment Management Outsourcing

In an ever-evolving financial landscape, clients demand more than just ad-hoc advice. We equip CPA firms with in-depth, tailored strategies that consider the tax implications at every turn. From short-term gains to long-term retirement plans, we ensure that every investment move is calibrated for disciplined investment strategies while being tax-efficient.

Valuations Outsourcing

The world of valuations is rife with complexities. Whether it's for estate planning, divorce settlements, or corporate strategizing, accuracy can make or break a client's financial decision. We delve deep, applying meticulous methodologies to provide precise results. And here's the best part: while we handle the intricacies of valuation, your relationship with the client remains undisturbed.



You did exactly what you said you would do, and I am now not chasing paperwork, **but giving my clients better service and making more money.**

- A Valued Partner



PATTON ARCHER

Our Core Values



Family First and
Client-Focused



Unlock unparalleled financial cohesion for your clients.
Reach out to partner with Patton Archer Corporation.

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Investments offered through Archer Investment Corporation. An investment adviser does not imply any level of skill or training. For more information please visit adviserinfo.sec.gov and search for our name.