

A Portrait of Stonefield Josephson



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A NOTE FROM OUR MANAGING PARTNER

“With a career in accounting at Stonefield Josephson, you can expect hard work, great challenges, and great rewards. You can also expect to have a balanced life. We strive to strike a balance between work and life by creating a personal, friendly and eco-friendly work environment where hard work is rewarded and fun is encouraged. At Stonefield Josephson, you will know your co-workers and can look forward to many of them becoming friends. You can expect to know the partners on a personal level. With their open-door policy, you will be encouraged to visit them for questions and consultation. You will be invited to participate in many Firm social events. Finally, you will have the time to have a life outside of work and most importantly, you will look forward to coming to work each day. At Stonefield Josephson, enjoying work is our way of life.”

Jeff Garrison

WHO WE ARE

Stonefield Josephson is an internationally recognized, fast-growing and innovative leader in the field of accounting. Founded in 1975, our California-based firm serves public and privately held U.S. and international clients from offices in Los Angeles, Orange County, San Francisco, East Bay, Silicon Valley and Hong Kong. We were named by INSIDE Public Accounting as the nation's third fastest-growing accounting firm. In addition to our key tax and advisory service areas, we were listed by Bowman's Accounting Report as one of "America's Top 25 Auditors" for three of the last five years.

Stonefield Josephson's international experience includes professional staff that has worked on six of the seven continents—Africa, Asia, Australia, Europe, North America and South America—and we'll be pursuing work on the seventh, Antarctica, as soon as our snowshoes are delivered. Stonefield Josephson clients receive the latest and most complete information, analysis and resources from experts at the source via our international networks. We cultivate strategic relationships with financial, political and business professionals around the globe to serve you at the highest level.

Our growth and global reach means we can offer our clients the best of both worlds—all the personal service and local knowledge of a regional firm, as well as the resources and expertise of an international Big 4 company.



PHILOSOPHY

Our Philosophy: We Pay Attention

Attention and good service in today's marketplace is rare because they require actively listening to and understanding a client's needs. They require thoughtful attention, not just to the details, but also to the big picture. By pledging our undivided attention to the needs and welfare of our clients and following through in a timely manner, we commit to professionalism and technical excellence.

MISSION STATEMENT

Stonefield Josephson is dedicated to maximizing our clients' business strategies through our knowledge, experience and technical expertise. In an environment that fosters a healthy, work-life balance, we welcome challenges, find effective, creative, personalized solutions, and with unwavering integrity and reliability – deliver results. Along our journey to success, with a passion for the profession, we embrace open communication, growth opportunities, personal and professional needs, and giving back to the community.

CAREERS

We have a vital responsibility to the quality of our work and the level of service provided to our clients. We offer an environment that is supportive of personal growth and fulfillment, and we understand the importance of leading a successful career while maintaining a productive life outside of work. We are focused on maintaining an internal climate that maximizes the full potential of each employee.



VALUES

Appreciation

The attitude, effort and performance of our employees are recognized, appreciated and rewarded, whether it is for bringing in their first account or a significant new account, collecting a difficult receivable, having a great billing month, bringing in a tough job on budget, or helping others to meet a tight deadline.

Change

Change is one of the few constants in life. By embracing the changes brought about by creative minds, we are forever improving the physical, emotional and financial communities in which we work and live.

Creativity

We nurture creative thinking by empowering others to generate ideas and suggestions in a safe environment.

Giving

We are committed to giving, both within and outside of the firm. We will give back to the community by wholeheartedly embracing civic, professional and or charitable organizations and providing quality time and energy to help make a difference.

Innovation

We actively seek out and develop new ideas and practices to meet the changing dynamics of our industry.

Integrity

Our integrity is one of the key building blocks of our success. We will conduct ourselves professionally according to the highest ethical standards. Keeping our word enhances the stature of the Firm and its members. Our actions will be consistent with our words.

Joy

We take the time to share “good feeling” experiences and spread joy whenever we can. Firm members take the time to share lunch with each other and attend social events together. We help to create happy memories of times spent together.



Mentoring

We provide an environment where mentoring flourishes. Proactive mentoring at all levels will enhance firm members' growth professionally as well as personally. Firm members will give freely to others of their time, their skills and their wisdom in order to help others become successful.

Respect

Firm members acknowledge that respecting others requires a high regard for, and great consideration and sensitivity towards, people's physical and emotional needs and wants. We will strive to treat others with the same high-level of respect that we would hope to receive from them.

Professionalism

We require Firm personnel to at all times maintain their professionalism and act with integrity, objectivity, independence where required, adherence to professional standards and applicable laws and regulations, and a demonstrated will to maintain and improve the quality of professional services.

Sharing Life Events

Firm members will give of their time in recognition of the life cycle events of others. We will attend weddings whenever possible, mourn with them at the loss of family members, and acknowledge and celebrate the birth of a child. The message communicated will be one of team, of family, and of one's importance beyond the contributions in the work place.

Teamwork

Teamwork involves willingness at the right time to relinquish control, check our egos, and be part of the group.

Trust

Firm members stand behind the promises we make and will deliver upon those promises with character, integrity and with our greatest abilities.



KEY INDUSTRIES

- Apparel
- Financial services
- Healthcare
- Life sciences
- Manufacturing/distribution
- Media & entertainment
- Nonprofits and foundations
- Real estate
- Retail
- Service firms
- Startup & emerging companies
- Technology



OUR SERVICES

Accounting and auditing

Private companies

- Accounting
- Audits, reviews, compilations
- Business advisory services
 - Accounting and auditing consultation
 - Due diligence
 - Mergers and acquisitions transactions
 - Outsourced internal auditing
 - Profitability analyses
 - SAS 70
- Pension/profit-sharing plans

Public companies

- Audits
- Due diligence
- IFRS compliance
- Initial Public Offerings
- Quarterly reviews
- Response to SEC letters of comment
 - Sarbanes-Oxley compliance
- SAS 70
- SEC registration statements

Government (Yellowbook)

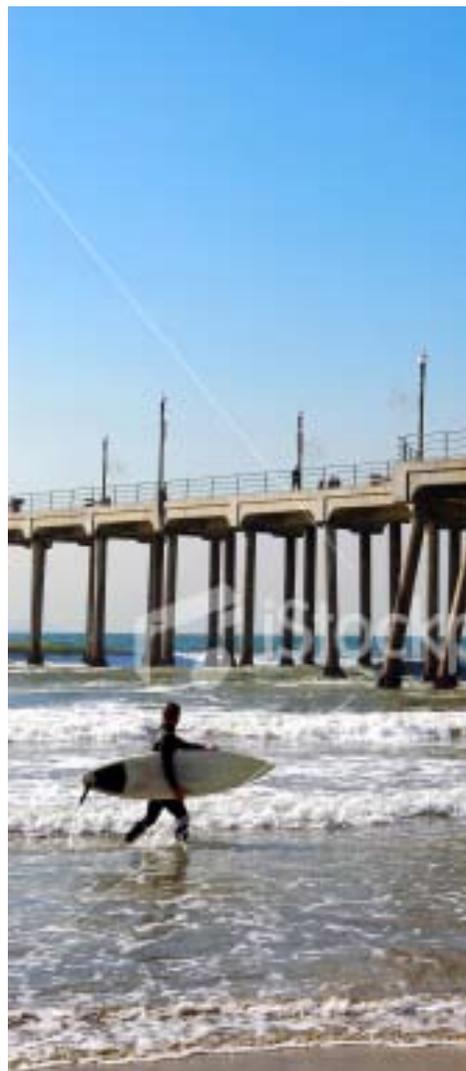
- Attestation engagements
- Performance audits

Tax

- Business formation/entity selection
- Estate planning
- FAS 109/FIN 48 services
- “Green” tax credits
- International tax
- IRS/state tax representation
- Mergers and acquisitions consulting
- Planning/consulting
- Research and development tax credits
- State and local tax
- Tax return preparation
- Valuation

Advisory

- Business consulting
- Forensic advisory services
 - Bankruptcy
 - Business valuation
 - Contract compliance
 - Forensic accounting
 - Fraud risk management & remediation
 - Litigation support
 - Royalty auditing
- IFRS compliance
- Internal audit services
- Sarbanes-Oxley compliance
- Startup & emerging companies



STONEFIELD JOSEPHSON UNIVERSITY

Stonefield Josephson is dedicated to ongoing professional development and embraces continuous learning at every level of the organization. We know that the strength of our firm lies in the knowledge and experience of all our employees. To ensure that we all have the opportunity to reach our highest potential, we have created Stonefield Josephson University (SJU).

Within SJU, we will provide learning opportunities in six key areas:

- *Technical Skills*
- *Engagement Management*
- *Business Development and Marketing*
- *Leadership*
- *Team Building*
- *Personal Development*

Technical excellence is essential for us in providing the quality of service our clients expect. SJU will provide a comprehensive technical curriculum to compliment and enhance the on-the-job training that all employees gain through client engagements.

But SJU is about more than technical knowledge. We will provide the opportunities and resources for all our employees to develop leadership skills that can advance their careers and enhance their personal growth.

SJU will provide a blend of learning opportunities including instructor-lead, web-based, on-demand and informal symposia to assure that we maximize individual learning. We want to be certain that our people have access to an array of information and resources to meet their individual learning needs.

The curriculum developed through SJU will be the foundation for creating individual learning ladders to help our employees chart their career path. These learning ladders will be diverse and include training across all six areas so that our people can be well-rounded, fulfilled and successfully contributing members of the firm.

We know that the leaders we develop today will ensure our success tomorrow.

HOW TO GROW A CAREER

To achieve career goals at Stonefield Josephson, we recommend that our workers focus their energy on achieving a high level of performance in the following ten areas:

Practice Management

Run your assignments in an efficient and profitable manner so that you meet or exceed your production goals.

Communication

Be able to write and speak in a manner in which you are clearly understood.

Leadership

Leadership is a set of skills that both potential and experienced leaders can develop, hone, and utilize to transform challenging tasks into spectacular successes.

Client Service

Be responsive to the client's need for speedy and cost-effective resolution. Provide proactive, effective, strategic accounting advice and assistance.

Technical Expertise

Continually strive for more knowledge in your areas of expertise.

Business Development

Consistently bring new revenues to the firm through existing clients or new ones.

Community Involvement

Be active in the community to such an extent that your contribution is easily recognized.

Administrative Responsibilities

Consistently perform your administrative duties – time/billing, evaluations, industry groups, etc. – in a timely and professional manner.

Recruiting

Take an active role in recruiting others to join the firm.



SUGGESTIONS FOR SUCCESS

- Know the mission statement
- Know and practice the Core Values and Operating Conduct of the Firm
- Maintain integrity in all you do. Be honest
- Understand the duties and responsibilities of your job
- Dress and act like a professional at all times
- Be an ambassador of Stonefield Josephson inside and outside the workplace
- Be knowledgeable about the services provided by the Firm
- Deal with issues and problems in a timely and professional manner
- Take pride in your work. Quality counts
- Observe and practice proper telephone, e-mail and correspondence etiquette
- Continue to develop your technical knowledge
- Be responsible for client confidentiality
- Respect your clients, your colleagues and yourself
- Value your clients. Be generous with praise and thoughtful with feedback
- Develop and train others
- Contribute to the community
- Be a good listener
- Get to know your co-workers
- Have balance in your life
- Promote teamwork to create a positive work environment. Rejoice in others' achievements
- Embrace change. Be open to possibilities. Seek Opportunities. Think before you speak
- Take care of yourself by getting enough sleep, eating healthily and exercising
- Choose to be positive every day. Show others that you care
- Have fun. Enjoy the journey



BENEFITS

- Competitive base salary
- Annual compensation reviews
- Medical, dental and vision coverage
- Life and disability insurance
- Vacation/Personal days & holidays
- Sick Leave

- 401k Plan
- Opportunities to telecommute
- Incentives and bonuses
- Financial reimbursement for successful completion of CPA exam
- Free parking in most offices
- Meals and special offerings and events provided during busy season



WHAT'S IN IT FOR YOU?

- A career path
- Interesting and challenging work in diverse services and industries
- Quality of life
- An environment supportive of personal growth and fulfillment
- Regular interaction with Principals
- A team-oriented work environment
- Strong mentors and ongoing training through the Stonefield Josephson University
–a culture of continuous learning and personal development
- More growth and leadership opportunities than in a Big 4 company
- Extensive international affiliations
- Specialized industry, service and niche marketing campaigns
- Advanced technology
- A competitive compensation and benefits package
- More hands-on opportunities to attend seminars and participate in networking and campus recruiting events



CHOICE WORDS FROM OUR PRINCIPALS...

Why I Enjoy Working Here

Over the years, this job has allowed me to meet world class athletes, Hollywood actors and actresses, an astronaut, and many dynamic business owners. I could have done many things for a living, but none of them would have provided me with such a wide range of experiences, both socially and professionally. If I had to do it all over again, I wouldn't change a thing.

Rob

In our work environment, I am a true entrepreneur. I do not have to report to a bureaucracy. I choose my own prospects and clients with whom I like to work. They often become my friends and we have a deep respect for each other. We work together on many aspects of the business. Where else can you be involved with so many businesses and know that you can make a tremendous impact? What could be more rewarding and satisfying? Oh, and finally -- I get to play lots of golf!

Ron

Stonefield has let me be me, from the time I walked in the door straight out of USC over 20 years ago, through today. Unlike my highly regulated work product, I get to be creative, I get to make fun of my bosses (now my partners) and I get to hang out with my clients.

Lenny

I love the adrenaline rush of working with the management teams of up and coming companies. My fellow Principals are the best!
--Nanette

Stonefield Josephson pays attention to its clients and to its people with sincerity and consistency.

Sheri

I joined the firm in 2001 and have been here since then. "You do things differently," "Your firm is different from other CPA firms," and "You don't look like an accountant." These are the comments I get from the people in the community and what they feel about us. We think outside the box and this is what I like about this place.

Lawrence



I came here straight out of USC eleven years ago, unexpectedly. I had no intentions of working anywhere but the Big Six because that is where my dad worked and I had offers in hand from half of them. At my first interview at Stonefield, the first question the tax partner asked was, "How was your weekend?" And we continued to talk casually. When I walked out of the interview, I thought to myself, "this place is different than the Big Six." Since that time, I have never looked back. Now I am a tax partner asking recruits how their weekend was. I am part of an outstanding group of eclectic entrepreneurs who are excellent mentors, value the quality of life, flexibility and who promote internal growth. What else can you ask for as a professional?

David

There is a great synergy here. Having people around to bounce ideas off of makes the work easier and more exciting – especially when you enjoy the people with whom you work.

Candace

Before entering public accounting I worked in private industry and the government. I wanted the intellectual stimulation of working around bright people, so I joined a Big 8 firm. Then I wanted that same stimulation in a more positive environment with greater opportunity, so I joined Stonefield. Been at it 35 years and it is still fun.

Sam

I appreciate the opportunities that Stonefield Josephson has offered me, both professionally and personally. The client situations and technical issues are challenging; the people I work with are exceptional; and I still have time to enjoy my family and watch my children grow.

Carmen

As an intern, I am grateful that Stonefield Josephson saw the potential in me and gave me the opportunity to do an internship during tax season of 2009. One thing that amazes me is the attention our tax principal Jim Katherman gives to his employees. For example, every time he passes by my cubicle, he always tells me hi and sees how I am doing with my work. You can tell that he does not ask because he has to, but because he cares. That type of attention keeps me feeling good about myself. It shows me that I am not just a number in the company, but a person. It is true...Stonefield Josephson does pay attention!

Gaudi

Whether I'm going through life's difficulties or life's triumphs, I can always count on my family



to be there for me. Yet when I'm facing challenges at the workplace, I turn to a different family for guidance and advice: my co-workers, managers and principals at Stonefield Josephson. They are always looking out for my best interests because they want to see me grow personally and professionally within the company. I consider myself very fortunate because I have two wonderful families!

Lee, Staff Accountant

Being a new staff in any profession requires mentors who are patient, knowledgeable, inspiring, passionate and supportive to assist us new staff in becoming not only exceptional professionals but remarkable individuals. At Stonefield Josephson you will find just that!

Christene, Audit Staff

I truly enjoy working at Stonefield Josephson because it allows me to work with some of the most talented and intelligent people in the profession and across various industries. It also provides me with stimulating and scintillating challenges on a daily basis, allowing me to learn and develop constantly, improving myself as a professional. These and various other reasons are the ones that keep my career here at Stonefield Josephson one that is worthy of passion-filled work.

Nino, Audit Senior

One of the reasons I chose Stonefield and stayed at Stonefield is its great work-life balance. I couldn't have imagined working at a public accounting firm, learning so much in a short period of time, and amidst all the fray, being able to manage my life outside of work. It's been a great opportunity!

Andrea, Senior Tax Staff

I enjoy working in SJ because of its friendly working environment and open-door policy of partners.

Ping, Senior Auditor

I made the decision to work at Stonefield Josephson, because of the people I met through the interview process. What set them apart was that they really took an interest in who I am, where I came from, my background, my interests... Eight months have passed since my first day at SJ, and my perception has not changed. Stonefield Josephson professionals do pay attention!

Maria, Staff Accountant



