

Strategic Business Plan

Unique Business Proposition

Ulrich and Associates is a leading CPA firm in Northern Utah. We service individuals and medium sized business entities, government agencies and non-profit organizations by providing excellent financial talent and technical capabilities to deliver innovative, effective and reliable solutions to our clients in such a personal & professional way that they are awed by their experience.

Purpose

Ulrich and Associates' purpose is to develop a team of loyal professionals who are willing and capable of providing specialized services with integrity, skill and creativity, enabling those they serve to obtain peace of mind in financial matters. Christian principles are embraced and recognized as the foundation for success.

Goals

Ulrich and Associates' goal is to grow to a \$20 million firm in the Northern Utah area. We will expand our resources and capabilities in providing small business services, solidify our expertise in governmental & non-profit accounting and auditing, increase our ability to provide tax planning and consulting services for complex tax matters and develop additional specialties in business valuation, exit planning strategies, and financial services to high net worth individuals. We will increase gross revenues by 10-15% per year achieving a gross profit margin of 55% and return-on-equity of 16%.

Strategy

Ulrich and Associates' strategy is to increase our leading position in the government & non-profit sector and expand our small business accounting, tax and consulting services. We will continue to enhance our reputation and position as a quality employer with outstanding firm capabilities in our chosen areas of specialization. We will create a unique client experience for each and every client and achieve service delivery superiority in our market.

Our plan to grow 10-15% per year will be accomplished by greater penetration in the top of Utah market via firm acquisitions, expanded office locations and increased market share. We will enhance our growth by attracting, training and retaining the most talented professional and support staff available. We will utilize state-of-the-art technology. Our team will be the most customer focused in the industry. Success individually and collectively will be our legacy.