

Professional Services Financial Services



OUR INDUSTRY SPECIALISTS

Olsen Thielen professionals have built a respected practice geared toward helping our clients not just meet their present-day challenges but also look forward to the future with confidence. Our clients look to us as trusted, strategic partners who have a deep knowledge of their business and priorities. We want to be an extension of your team. To learn more, contact one of our industry specialists:



John Lu | CPA, MAcc
952-829-3421
jlu@otcpas.com



Thomas Pesch | CPA/CGMA, CMA
952-829-3430
tpesch@otcpas.com



Andrea Addo | CPA, MBA, CFE, CITP
952-829-3425
aaddo@otcpas.com



Lance Nieland | CPA, MBT
952-829-3405
lnieland@otcpas.com



Adam Thielen | CPA
651-621-8560
athielen@otcpas.com

Since 1921, Olsen Thielen has been serving firms in the Twin Cities and has grown to become one of the top CPA and consulting firms in Minnesota.

LOCATIONS

2675 Long Lake Road
Roseville, MN 55113
651-483-4521

300 Prairie Center Drive #300
Eden Prairie, MN 55344
952-941-9242

WE SERVE YOU

As a professional services firm in the industry ourselves, Olsen Thielen understands the unique needs and areas of concern that our financial service clients face. You need advisors with the experience and resources you can rely on to offer timely, proactive advice on important issues to keep your organization compliant, competitive, and efficient. Our clients appreciate the fact that we are large enough to provide them with full-service expertise, yet small enough to provide them with timely, personalized service. Olsen Thielen's longevity and growth can be attributed to building strong relationships with our clients and earning their trust.

INDUSTRY EXPERTISE FOR FINANCIAL SERVICE FIRMS

Olsen Thielen serves a diverse set of financial service firms, including:

- Financial advisory and consulting firms
- Wealth management firms
- Insurance companies

SPECIALIZED SERVICES WE OFFER

We provide a broad range of services for financial service and advisory investment firms including, but not limited to, accounting, audit, tax, business management, and consulting services. We understand that many things make the financial industry unique and our professionals work with you to understand your goals and then develop and implement strategies to help achieve them. Some of the specialized services we offer are:

- Compensation planning and bonus formulas
- Business entity selection
- Retirement and pretax benefits planning
- Business valuation
- Purchase and sale of your practice or business
- Buy-in and buy-out planning
- Bookkeeping and payroll services
- Outsourced Controller/CFO services
- Deferred compensation planning
- Tax planning and preparation - business and personal
- Audits, reviews, and compilations of financial statements
- Internal control and operation reviews to enhance security
- Review of potential fraud allegations
- Estate, trust, and gift planning