

ABOUT OUR FIRM

Founded in 1949, O'Connor & Drew, P.C. is one of the leading full-service accounting, tax and business consulting firms in New England. Since its inception, the firm has been committed to building strong relationships with its clients by providing them with practical, proactive and responsive financial advice.

Superior client service is built on strong relationships that are facilitated by clear communication. This is why all client engagements are supervised by the partner-in-charge who has unique experience, sophisticated knowledge and an in-depth understanding of the business environment in which the client operates. Partners work closely with a highly-experienced and well-trained engagement team of audit, tax, and IT consulting professionals who offer a breadth of services, a depth of understanding, and creative solutions that maximize client business opportunities and solve complex problems.



ABOUT OUR PEOPLE

- 16 Principals
- 27 Managers and Supervisors
- 50 Professional Staff
- 41 CPAs
- Servicing over 300 Automobile Dealership Clients
- Representing more than 50 Higher Education Institution Accounts

SERVICE AREAS

- Accounting & Auditing
- Business Consulting
- Cost Segregation
- Employee Benefit Plans
- Estate Planning
- Fraud Investigation / Forensic Audits
- Internal Audit Services
- IT Audit Services
- Mergers & Acquisitions
- Quickbooks Services
- Succession Planning
- Tax Preparation & Planning
- Valuation
- Wealth Management

SPECIALIZED EXPERIENCE

Automobile Dealerships	Higher Education Institutions	Employee Benefit Plans	Manufacturers & Distributors	Non-Profit Organizations	Governmental Entities
<p>Some Services Include:</p> <ul style="list-style-type: none">• Internal Auditing• Operational Review• Dealership Acquisitions & Due Diligence• Financial Reporting• Fraud Investigation / Forensic Audits• Warranty Parts Reimbursement Analysis• IT Audit & Security Assessments	<p>Some Services Include:</p> <ul style="list-style-type: none">• Annual Financial Statement Audits• Compliance Audits of Financial Aid Funds• Presentations to the Institution's Board of Trustees/Directors• Tax Services, including Analysis of Sales Tax and Unrelated Business Income• Annual Audits of the Related Institution's Foundations Financial Statements	<p>Some Services Include:</p> <ul style="list-style-type: none">• 401(k) Plan Audits• 403(b) Plan Audits• Form 5500 Preparation• Department of Labor Compliance Regulations	<p>Some Services Include:</p> <ul style="list-style-type: none">• Assistance with Financing Relationships• Assurance and Accounting Services• Budget and Variance Analysis• Cost Segregation Studies• Internal Control Reviews• Inventory Valuation• Merger and Acquisition Assistance	<p>Some Services Include:</p> <ul style="list-style-type: none">• Audit and Review of Financial Statements• Agreed-Upon Procedures Audits• Cost Allocations• Cash Flow Planning• Internal Control Audits• Tax Form Preparation• Tax Planning for Exempt and Non-exempt Entities	<p>Some Services Include:</p> <ul style="list-style-type: none">• Financial Audits (520-7)• Performance Audits (520-7)• Complimentary Audit Services (520-8) <p>Contract Number: GS-23F-9816H</p>

In addition to the niche focus industries listed above, we also have extensive experience numerous other industries including Construction, Financial Services, Fuel & Oil Supply, Professional Services, Real Estate, and Retail.

ORGANIZATIONAL INVOLVEMENT

Partners and staff are actively involved in national and local professional organizations specific to their areas of industry expertise and service line, including:

- American Institute of Certified Public Accountants
- Massachusetts Society of Certified Public Accountants
- Massachusetts State Automobile Dealers Association
- National Association of College and University Business Officers
- Eastern Association of College and University Business Officers
- Construction Financial Management Association
- South Shore Chamber of Commerce
- Boston Chamber of Commerce

Contact Us

To learn more about our firm, the services we offer, the industries that we support, or to speak directly to one of our experienced staff members, please give us a call at [617.471.1120](tel:617.471.1120) or send us an email at info@ocd.com.

