

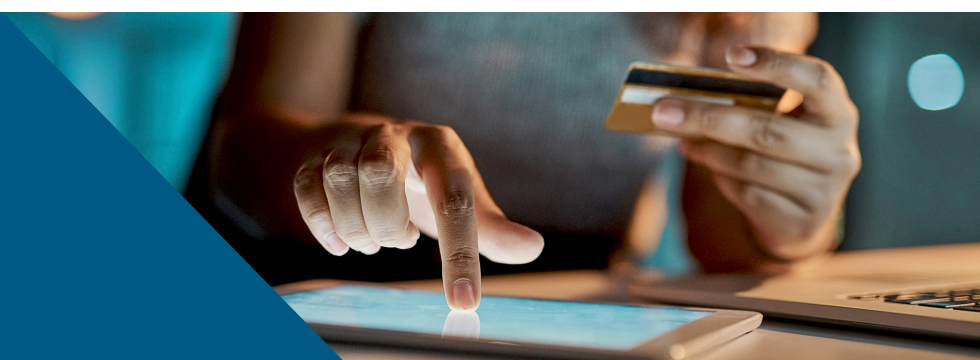


**GT REILLY  
& COMPANY**  
CPAs and Advisors

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# Financial Institutions



## GT Reilly & Company serves financial institutions throughout southern New England.

Our bank and credit union clients serve the same customers we do – businesses, nonprofits and individuals who live and work in New England. So we understand the opportunities and challenges our financial institution clients face in serving the same dynamic markets we serve.

*“GT Reilly has always done excellent work and the team is very accessible to help with issues that arise throughout the year.”*

– James Dunphy, President, South Shore Bank

### Our Clients:

- ◆ Community Banks
- ◆ Credit Unions
- ◆ Credit Union Service Organizations (CUSOs)
- ◆ Mortgage Companies and Brokers
- ◆ Retail Finance Companies

### Services & Expertise:

- ◆ Financial statement audits
- ◆ Tax compliance and planning
- ◆ BSA/OFAC validations
- ◆ ACH audits
- ◆ Forensic/fraud investigations
- ◆ Real estate cost segregation studies
- ◆ Regulatory issues consulting
- ◆ Merger & acquisition assistance
- ◆ BOLI, COLI and SERP programs
- ◆ Employee benefit plan services



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