www.baratellico.com
(561) 228-6123

FOR IMMEDIATE RELEASE

# Baratelli Opens, Bringing a Public Company CFO's Discipline to Family Office Accounting and Business Owners' Books

*Every company, investment, property, treasure asset and important document a family owns, in one place*

**WEST PALM BEACH, Fla., Nov. 30, 2026** — Baratelli opened today, offering family office accounting, bookkeeping and tax through Baratelli CPA & Accounting, PLLC, its CPA firm, and transaction advisory through Baratelli Transaction Advisory, LLC. Baratelli serves families, business owners and the lenders and advisors who work with them. It gives clients without a finance department of their own the discipline of a public company finance team.

**Everything in one place.** Every engagement runs on Baratelli Bankable, the firm's own platform. A family's companies, investments, real estate and treasure assets sit on one balance sheet, and its important documents (trusts, wills, deeds, titles, appraisals and insurance policies) are kept right beside them. When a family, its wealth advisor, an attorney or a lender needs the full picture, it is all in one place. The firm's team does the work and the founder stands behind it.

The founder, Philip A. Baratelli, CPA, MBA, is a former public company CFO and controller, a former family office CFO and an entrepreneur. He built Baratelli around one idea: every client deserves a CFO's experience behind their numbers. He is also the author of *The Family Office Reference Guide*, a two-volume set, *The CFO & Controller's Reference*, a three-volume set, *The Athlete's Wealth Playbook* and *Treasure Assets*, along with practitioner books on quality of earnings, M&A and private equity, all published by The Baratelli Institute and available on Amazon.

"Business owners and families have more software than ever, but software doesn't make sure the numbers are right," Philip Baratelli said. "That takes people who know accounting, a disciplined process and someone experienced standing behind the work. That's what we built Baratelli to deliver."

## What Baratelli Does

- **Family office accounting.** Consolidated financial statements that put a family's companies, investments, real estate and treasure assets (art, collections, aircraft) side by side, then combine them into one balance sheet. At the family's direction, wealth advisors get the same statements, so they see a client family's full picture, not just the accounts they manage. Monthly packages are written so beneficiaries, attorneys and other non-accountants can read them and act on them.
- **Monthly bookkeeping and catch-up books.** Clean, current books every month for a predictable fee. Catch-up work brings owners whose books have fallen behind back up to date. That helps their bankers too: a borrower with clean books gives the bank a clear place to start. It helps business brokers as well: messy financials can sink a deal, and clean books help a sale make it to the closing table.

- **Tax.** Tax preparation and planning for businesses, families and individuals, whether or not the firm keeps their books.
- **Overflow work for other firms.** Bookkeeping, monthly close and tax preparation for CPA and accounting firms when their own teams are at capacity, from tax season peaks to clients they can't yet staff. The partner firm keeps its client relationship.
- **Transaction advisory.** Through Baratelli Transaction Advisory, LLC, quality of earnings reports for buyers and lenders, plus readiness reports for owners preparing for a sale or a loan.

## One Firm, One Standard

Baratelli is built as one firm with one standard of work, so every client gets the same process, the same oversight and the same quality of reporting. The firm is affiliated with The Baratelli Institute, which publishes books and case studies on how successful companies and families build, run and pass on their businesses and wealth.

"We want to be the firm a family or business owner calls first," he said. "Whether it's a monthly package for a family office or a quality of earnings report ahead of a sale, the client gets the same thing: clear, well-supported numbers and a firm that explains what they mean."

> **See what Baratelli can do for you. Call (561) 228-6123.**
> www.baratellico.com

## About Baratelli

Baratelli offers family office accounting, monthly bookkeeping and tax through Baratelli CPA & Accounting, PLLC, its CPA firm, and transaction advisory through Baratelli Transaction Advisory, LLC. Its founder, Philip A. Baratelli, CPA, MBA, is a former public company CFO and controller, a former family office CFO and an entrepreneur, and the author of books on family offices, the CFO and controller role, athletes' wealth, treasure assets, quality of earnings, M&A and private equity. The firm's office is at 700 S. Rosemary Avenue, Suite 204, West Palm Beach, Florida. Learn more at www.baratellico.com.

**One firm. One platform. Every market.**

## Media Contact

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