



Partner Spotlight: AGL Westbrook, McGrath

In this issue, the Partner Spotlight would like to introduce you to AGL Westbrook McGrath, a public accounting firm offering audit, tax and advisory services. Their industry specialties include health sciences, technology, manufacturing & distribution, as well as nonprofit organizations. AGL (www.aglpc.com) was launched in September 2007 and has experienced rapid growth from client demand as well as from a recent merger with Westbrook, McGrath, Bridges, Orth & Bray. The combined firm has nearly 30 professionals in 3 offices: Johns Creek and Duluth, GA and Indianapolis, IN.

The entrepreneurial culture that permeates the firm has led them to distinguish themselves in several ways; specifically, a firm-wide paperless environment, audit engagements that “pay for themselves” by also uncovering top-line revenue opportunities and bottom-line savings, and R&D tax credit studies that deliver a return today and for years to come. Roger Gallivan, AGL founder and Managing Partner of AGL, says it this way: “We offer traditional accounting services... but our delivery is anything but traditional. We view every engagement through the lens of our client’s broader business and look for tangible ways to make them and save them money. Our goal on every engagement is to find tangible cash benefits that provide a high return on our client’s investment in our services.”

Harvest and AGL recently teamed up to help Technology Global Alliance, an IT and telecom expense reduction company, deliver more value to one of their mid-sized customers. During a telecom audit at a for-profit customer, TGA discovered 21 nonprofit tax-exempt entities – located in 16 states – had been paying taxes by mistake. By bringing an AGL multi-state tax expert onto the project team, TGA has maximized the recovery of overpaid state and local taxes and is now focused on federal tax recovery. According to Rick Tillou, TGA Telecom Practice Leader, “The AGL tax expert pinpointed the right taxing authority, worked with the telecom service provider, and coordinated with the customer’s tax department to make sure our customer recovered all of the overpaid taxes that they were entitled. Our team couldn’t have done it without them.”