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CONNECTICUT
WOMEN IN BUSINESS

Halpern & Associates, LLC

Expertise and Proactive Accounting Solutions

Entering the grounds of Halpern & Associates, LLC, one is struck by the remarkable elegance of the surroundings. An early 19th century country home beckons, inviting old world



warmth, privacy and confidentiality. This is exactly the environment President Barbara Halpern envisioned when she began her career at a top-tier NYC accounting firm in 1974.

"I knew there was an opportunity to take the professionalism of a large firm," Halpern recalls, "and transform it into a boutique company whose hallmark is personalized service."

Following stints as controller for two brokerage houses, Barbara established Halpern & Associates in 1982. From hedge funds to small businesses, broker-dealers and individual clients, the firm's range of expertise in accounting, hedge fund administration, auditing, and tax planning and preparation has served Tri-State area clients well for over 25 years. With her two sons and a dedicated team of CPAs and other professionals, Halpern & Associates has achieved the vision the founder set forth in 1982.

In-Depth Know-How Builds Client Loyalty

As one prominent hedge fund manager remarked, "Halpern & Associates has created a unique professional service paradigm. They combine classic core values of dedication, privacy and extraordinary personal service with cutting-edge know-how. Their mastery of hedge fund administration, along with timely and accurate reports and tax returns for my fund and investors, is critically essential. It's why I work with them. I appreciate their attention to my company. It's what makes them exceptional."

Barbara echoes her client's sentiment: "We believe that our clients' satisfaction levels and the success of our firm are mutually dependent. The knowledge we have of industry practices and experience across multiple categories is our starting point. Our discernible advantage is our passion for gaining intimate knowledge of clients' businesses and understanding their needs. At least 90 percent of our new engagements are referrals from existing clients. Our clients rely on receiving quality and attention. They have no hesitation in recommending us to their colleagues."

Cohesive Team of Committed Professionals

The complexities of the accounting profession are always evolving and, for that, the firm is committed to ongoing professional development. "It's important to maintain our state-of-the-industry expertise. We were one of the first firms in Connecticut to become registered with the PCAOB, and we continually keep up to date on current accounting, regulatory and tax issues by attending AICPA seminars and conducting weekly, in-house continuing education sessions."



"At Halpern & Associates, LLC we are committed to offering the highest degree of professionalism in servicing our clients. We have the resources and business acumen necessary for the ever-changing business environment in which we now live."

— Barbara Halpern, president and founder

At the heart of the firm's successful signature approach to service, Halpern says, is teamwork. "When a client engages us, we don't just assign a person to their business. We engage the entire firm on their behalf so we are able to draw upon the different backgrounds and skills of the entire team. This is where our teamwork approach pays off.

"We are a service business," concludes Barbara, "and our clients seek our services for the caliber of our competencies. By approaching our business with a dedication to excellence in all we do, we create confidence and trust in Halpern & Associates."

Halpern & Associates

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