

Nancy Mehlberg, CVB, EA

Principal

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Nancy is a Principal with SVA Certified Public Accountants and helps clients improve their company profitability and protects their interests by clearly understanding their future goals. She works closely and proactively with clients with an emphasis in business and income tax planning and financial reporting.

Nancy helps clients establish internal financial reporting procedures and provides year-end financial reporting services. After evaluating procedures and processes, Nancy recommends options to streamline business processes. She reviews and recommends software that ensures management is provided with timely and accurate financial reports to run a profitable business.

Her expertise includes selection, training, and establishing procedures and reporting for a variety of financial reporting software options.

Nancy is a Sage Intacct Certified Implementor, a Certified Value Builder™ (CVB) and an Enrolled Agent (EA) with the IRS. Her expertise with the Value Builder System™ helps businesses develop a strategy to improve the value of their company. Using SVA's Path to Financial Independence, a proven methodology to create a thriving business, Nancy works one-on-one with her clients to help them analyze their ongoing performance against key drivers.

Nancy currently serves on the Board of Directors for SHARP Literacy Foundation.

Areas of Expertise

- Value Building
- Financial Reporting Software
- Tax Strategy and Planning
- Succession Planning

Industries

- Manufacturing/Distribution
- Construction
- Real Estate
- Retail
- Services Companies

Credentials

- Certified Value Builder (CVB)
- Enrolled Agent - IRS (EA)
- Sage Intacct Certified Implementor)

Education

Lakeland College

- Bachelor of Arts – Accounting, Business Administration, and Computer Science