

## EXACTNESS AND CONFIDENTIALITY

We work with demanding clients and we uphold to deliver with professionalism and complete discretion the assignments we are trusted with.



## Methodology

We privilege highly personalized services by performing our tasks at the clients' facilities. We use tailored made audit software developed towards the needs of our clients and scope of our services.

All our services are rendered by highly specialized staff prepared to meet the requirements of our clients' needs in our field of work and specific contractual requirements.

## Human Resource

Our professionals have experience and ability to work with clients from various origins and nationalities as well as different Generally Accepted Accounting Principles

Our team possesses a wide range of professionals in areas such as management, chartered accountants, accountancy and external consultants with recognized knowledge in their fields of expertise, such as engineers, lawyers.



### Santos Vaz & Trigo de Morais, SROC

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**SANTOS VAZ & TRIGO MORAIS**  
SOCIEDADE REVISORES OFICIAIS CONTAS



## Contacts

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## Presentation

Our services aim towards a wide spread of areas of management:

- Assurance (Auditing)
- Tax Consulting
- Management consulting
- Financial evaluation
- Economic feasibility studies
- Organization and strategy

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# Audit and Consulting Services

## TAILORED TO YOUR NEEDS

We have a broad network of consultants in specific areas, such as IT, tax, legal and real state, which enable us to enlarge and complement the scope of our services

Under a Joint Venture we have been certified external auditors for EU financed projects and have been appointed to audit several projects regarding public institutions and European funds

SVTM – Santos Vaz & Trigo de Morais SROC was founded in 1997 by widely experienced professionals from different backgrounds covering a breath of expertises, namely in auditing and consulting services. The firm currently has offices in Porto and Lisbon (through a partnership) and assures a national coverage for its services.

## sectors of our clients

**Agriculture and Livestock.** Swine meat processing companies, agriculture and wine producing cooperatives.

**Construction and Real State.** Constructing companies, road recovering companies.

**Education and Culture.** Private schools, non for profit institutions and museums.

**Environment & Health.** Collecting, recycling and processing of urban waste companies, private clinics.

**Financial Services.** We work with companies that manage equity, wealth, investments and financial products.

**Hospitality and Tourism.** Hotels, restaurants and catering companies.

**Manufacturing.** Textile, auto industry, metal assembly, mining, cork processing and other types of industrial companies, high Tech Investigation centers and business incubators centers.

**Public entities and subsidized projects.** Public institutes, Municipalities. We audit state and European funded projects

**Retail and Distribution.** Agriculture vehicles distribution, food retail and trade, electronic appliances resale, auto parts distributions.

## Assurance (Auditing)

- Auditing/Legal certification of accounts:
  - Share owned companies
  - Public entities
- Financial analysis
- Implementation of Cost accounting methodology
- Verification of legal compliance
- Internal control reviews
- Strategic and long term analysis
- Internal management audit

## Tax Consulting

- Verification of tax compliance
- Tax situation diagnostics
- Tax planning
- Research and recommendation of suitable tax frames
- Analysis of financial and income tax statements

## Management consulting

- Financial and legal advice in mergers and acquisitions
- Analysis of projects' financial feasibility
- Restructure of companies
- Consolidation of accounts
- Bankruptcy or liquidation proceedings

## Financial evaluation

- Trade or Acquisition of a companies
- Floating and Fundraising
- Mergers/Divisions and liquidations

## Economic feasibility studies

- Analysis of the company and its environment
- Strategy and impact analysis
- Objectives definition
- Follow-up
- Economic and financial grounds analysis for municipal taxes and fees

We currently hold a portfolio of approximately 120 active clients, in almost every sector of the economy.

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