

## Joseph R. Bertels, CPA Business Broker

Joseph joined BND Commercial as part of an expansion to lead the Business Brokerage division. Joe handles business mergers & acquisitions. He is the founder of West Financial Services, LLC, which is a licensed public accounting firm specializing in the brokerage of businesses. Previously, Joseph was the head of the assurance services division for a local accounting firm and was responsible for implementing policies and procedures to streamline and standardize the audit and review process for the preparation of annual financial statements. His duties also included audits of multi-million dollar companies as well as the preparation of federal and state income tax returns. Joseph has previously worked with Krouse Kern & Company as well as Somerset Financial Services in Indianapolis. Joe is a graduate of Tri-State University with a Bachelor of Science in Business Administration with High Honors.

### Joseph's professional qualifications include:

- ◆ Licensed Certified Public Accountant
- ◆ Licensed Indiana Real Estate Salesperson
- ◆ Membership with the Indiana CPA Society
- ◆ Membership with Midwest Business Brokers and Intermediaries
- ◆ Membership with International Business Brokers Association
- ◆ Adjunct instructor at Tri-State University, teaching Advanced Financial Accounting, Advanced Income Tax and Auditing

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**Joseph's professional experience includes the following:**

- ◆ Buyer's Agent for acquisition of a multi-million dollar insurance agency in Indiana.
- ◆ Buyer's Agent for acquisition of bearings and drives distributor located in Alabama.
- ◆ Buyer's Agent for acquisition of a trucking company located in Idaho.
- ◆ Buyer's Agent for acquisition of insurance agencies throughout the United States.
- ◆ Exclusive Agent for turnkey cellular phone stores in Indiana.
- ◆ Seller's Agent for disposition of Bogeyes Bar & Grill, Fort Wayne, IN.
- ◆ Lead accountant responsible for due diligence inquiries and information disclosure in the sale of a title company for \$18,000,000.
- ◆ Lead auditor responsible for financial statements of a multi-national software company.
- ◆ Lead auditor for gasoline / convenience store company with 40+ locations in northeast Indiana, northwest Ohio.
- ◆ Lead auditor for franchise pizza restaurant with 40+ locations throughout Indiana.
- ◆ Lead auditor for professional baseball franchise.
- ◆ Lead auditor for various commercial contractors specializing in commercial construction, excavating, electrical, roofing and residential construction.
- ◆ Preparation of multi-state income tax returns for worldwide furniture manufacturer with sales exceeding \$200 million.