

Joseph R. Bertels, CPA Business Broker

Joseph joined BND Commercial in 2007 as part of an expansion to lead the Business Brokerage division. He is a licensed Certified Public Accountant as well as a licensed Indiana real estate salesperson. Joe specializes in 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, he was the head of the assurance services division for a local accounting firm where he was responsible for implementing policies and procedures to 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. Joe has previously worked with Krouse Kern & Company as well as Somerset Financial Services in Indianapolis.

Joe graduated with high honors from Trine University with a Bachelor of Science degree in Business Administration. He also taught as an adjunct instructor there, teaching Advanced Financial Accounting and Advanced Income Tax and Auditing for three semesters.

He is a member of the Midwest Business Brokers and Intermediaries and the International Business Brokers Association.

Joe enjoys outdoor activities and spending time at the lake with family and friends. He and his wife, Jenni, have two children.

joe@bndcommercial.com

(260) 469-7119

Joseph's professional experience includes the following:

- ◆ Seller's Agent for feeder bowl manufacturing company (+\$5 million revenue) in Indiana.
- ◆ Seller's Agent for bulk fuel distributor (+\$5 million revenue) in Indiana.
- ◆ 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.
- ◆ Seller's Agent for disposition of numerous bars, including Bogeys Bar & Grill, Buckets Sports Pub and Grub and Legends, 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.