

LEGACY BAY

SBE Certified · SAM.gov Registered · Small Business

Financial Services & Advisory

CAPABILITIES STATEMENT — DIVISION ONE-PAGER

Division Overview

Legacy Bay's Financial Services & Advisory division delivers government-focused financial consulting, business valuations, fiscal compliance, grant lifecycle management, and investment advisory services. We help agencies, nonprofits, and contractors navigate complex financial requirements with precision and compliance.

Core Competencies

- Business Valuation Services (enterprise, asset, intangible)
- Financial Analysis & Modeling
- Government Grant Management & Compliance
- Budget Development & Fiscal Planning
- Cost Accounting & Indirect Rate Analysis
- FAR/DFARS Cost & Pricing Compliance
- Audit Readiness & Financial Statement Preparation
- Investment Advisory & Portfolio Analysis
- Tax Advisory & Preparation Services
- Accounting & Bookkeeping Services
- Financial Due Diligence & Risk Assessment
- Small Business Financial Consulting
- Debt & Equity Financing Advisory
- Trust, Estate & Agency Account Management

NAICS Codes

523930	Investment Advice
541211	Offices of Certified Public Accountants
541213	Tax Preparation Services
541219	Other Accounting Services
522390	Other Activities Related to Credit Intermediation
523999	Miscellaneous Financial Investment Activities
525920	Trusts, Estates, and Agency Accounts

PSC Codes

B501	Accounting & Financial Management Services
B502	Auditing Services
B503	Budget & Program Review
B504	Cost/Price Analysis
C219	Financial Consulting

Company Information

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