



Our Story. Our Mission. Our Promise.

CHARLOTTE • WINSTON-SALEM • MOORESVILLE

*A legacy of honest work, careful numbers,
and steady guidance since 1988*

A Quiet Beginning

SINCE 1988

A Legacy of Trust

Our story began long before the KGOB name existed. In 1988, a small North Carolina accounting firm opened its doors with a simple commitment: to serve families and business owners with honest work, careful numbers, and steady guidance.

Over time, that legacy practice grew, adapted, and changed hands—but the heart of it stayed the same: **take care of people, do excellent work, and always tell the truth about the numbers.**

On February 1, 2022, that legacy formally evolved into **Kohari Gonzalez Oneyear & Brown PLLC (KGOB CPAs & Advisors)**, bringing together seasoned professionals, expanded locations, and a renewed focus on helping growth-minded clients navigate an increasingly complex financial world.



Why We Exist

Your financial life is never just numbers. It's the business you've built from scratch, the payroll you feel responsible for every two weeks, the retirement you're hoping to protect, the family you want to take care of.

Too many people feel like they're carrying that weight alone.

KGOB exists to change that.

KGOB exists to create extraordinary value for its clients, people, and community by pairing high-quality, comprehensive tax and accounting services with proactive advice that eases their burden, protects their wealth, and supports long-term financial success.

We see ourselves as a **financial nerve center** for our clients—a calm, expert team they can lean on year-round for clarity, confidence, and better decisions, not just a once-a-year tax stop.



The People Behind the Practice

Sara F. Gonzalez, CPA

MANAGING PARTNER

Sara brings more than 25 years of experience in public and private accounting across a wide range of industries. She did not set out to build a flashy firm. Her vision has always been more grounded and personal:

A place where clients feel respected and heard, not rushed or talked down to. A team that can take a complex situation, sit down with it quietly, and come back with a clear, practical plan.

Under her leadership, KGOB has grown into a multi-location, full-service CPA firm that combines:

- ◆ **Luxury Advisory** – thoughtful, high-touch guidance
- ◆ **Precision Compliance** – meticulous execution



Sara F. Gonzalez, CPA
Managing Partner

How We Work: Quiet Excellence

At KGOB, our culture is built around six simple but non-negotiable principles:

1. People First, Always

We care about how financial decisions *feel*, not just how they look on a spreadsheet. Clients come to us with real fears, and our first job is to listen.

2. Calm in Complexity

Bring us your "messy." Our role is to bring structure and calm to that complexity, not judgment.

3. Proactive, Not Reactive

We focus on year-round strategy, helping clients move from "putting out fires" to operating with a thoughtful, forward-looking plan.

4. Integrity in Every Decision

We do the right thing, even when it's not the easiest or most profitable choice. That includes being honest when we're not the right fit.

5. Teachers at Heart

We believe people make better decisions when they truly understand their numbers. Our goal is to make it understandable, not overwhelming.

6. Community Matters

From business networking to educational initiatives, we see our work as part of a larger commitment to the communities we serve.

Who We Serve

GROWTH-MINDED CLIENTS

The Middle of the Real Work

We primarily serve **growth-minded individuals and closely held businesses**—the people in the middle of the real work of running companies, creating jobs, and supporting families.

Many of our best-fit clients are:

- ◆ Small business owners who have outgrown DIY bookkeeping or basic tax prep
- ◆ Families with increasingly complex tax situations who want proactive guidance
- ◆ Business owners thinking ahead about growth, succession, or exit planning

We are selective about fit—not to be exclusive, but to protect the level of service we provide. We do our best work with clients who value long-term relationships and are willing to invest in doing things the right way.

WE SERVE:

growth-minded business
owners and families.



A Dual Approach

We combine two critical disciplines to ensure comprehensive coverage:

Luxury Advisory

Thoughtful, high-touch guidance when the decisions are complex or the stakes are high. We act as your strategic partner, helping you navigate long-term implications with calm, expert counsel.

From succession planning to entity structuring, we bring the perspective that comes from decades of experience serving business owners and families.

Precision Compliance

Meticulous tax, accounting, and reporting work so the details are handled and you can breathe a bit easier. We ensure accuracy, timeliness, and regulatory compliance.

Every return prepared, every reconciliation completed, every payroll processed—handled with care and precision by CPA-led professionals.

Together, these disciplines create a comprehensive partnership that protects your time, your peace of mind, and helps you keep more of what you've built.

Our Services

A comprehensive suite designed for growing businesses and their owners:

Bookkeeping & Accounting

CPA-led monthly bookkeeping as the financial foundation for growing businesses. Clean books, current financials, and confidence in your numbers.

Payroll & Tax Compliance

Coordinated payroll processing and tax filings through trusted software partners, integrated with your accounting for seamless operations.

Tax Preparation & Planning

Business and individual returns plus proactive, year-round strategy conversations to reduce liability and prepare for major decisions.

IRS Representation & Relief

Calm, structured support when facing IRS or state notices, audits, or back tax issues. We handle the communication on your behalf.

Strategic Advisory

Forward-looking planning for those ready to optimize entity structure, cash flow, valuation, and long-term business outcomes.

Assurance Services

Audit, Review, and Compilation services when third-party assurance is needed for lenders, stakeholders, or regulators.

Across all these areas, our goal stays the same: bring clarity, reduce stress, and support better long-term decisions.

Milestones That Shaped Us

Key moments that helped define who we are today:

1988 – A Legacy Begins

A North Carolina accounting firm is founded, laying the groundwork for what will eventually become KGOB CPAs & Advisors. The focus from the start: careful work, honest advice, and long-term client relationships.

February 1, 2022 – A New Chapter as KGOB

Transition to current ownership and rebrand as Kohari Gonzalez Oneyear & Brown PLLC, with an expanded presence in Charlotte, Winston-Salem, and Mooresville and a renewed commitment to high-touch, relationship-based service.

2023–2024 – Navigating Succession and Renewal

As prior leadership moved toward retirement, we focused on stabilizing the practice, modernizing key systems, and reaffirming our commitment to high-touch service. We used this time to sharpen our understanding of the clients we serve best and strengthen the internal processes that support them.

2024–2025 – Strengthening Our Foundation

We invested heavily in infrastructure: transitioning to modern payroll platforms, formalizing structured onboarding, and expanding our IRS transcript capabilities. We honed our team and workflows, building a culture that supports responsive, high-quality work.

2025 and Beyond – Quiet, Intentional Growth

With our people, systems, and client focus better aligned, we are now positioned for steady, intentional growth—serving a well-defined group of clients at a deeper level, and building tools that make complex financial decisions easier to navigate.



Our Vision for the Future

Looking ahead, we see KGOB continuing to grow—not as a volume-driven firm, but as a **trusted financial home base** for clients who share our values.

We envision:

- ◆ More clients who treat us as a year-round partner, not just tax season help
- ◆ More tools and platforms that make complex information easier to understand and act on
- ◆ More opportunities to teach, mentor, and support our community in practical ways
- ◆ A team that continues to develop professionally while staying grounded in humility and service

What This Means for You

If you are reading this as a potential client, here is what you can expect from us:

- ◆ We will listen before we recommend.
- ◆ We will take your situation seriously, whether it is simple or extremely complex.
- ◆ We will be honest if we are not the right fit—and grateful if we are.
- ◆ We will work hard behind the scenes so that, on your side of the relationship, things feel calmer, clearer, and more manageable.

For us, "success" is not just a completed return or balanced set of books. It is the moment you exhale and realize you don't have to carry all of this by yourself anymore. That's the work we quietly show up to do, every day.

THE RESULT

*"Business owners who sleep better at
night.
Families who feel more secure.
Communities that benefit from
stronger,
more stable local businesses."*

This is the work we quietly show up to do, every day.

Start the Conversation

If you feel aligned with this approach and would like to explore working together, we invite you to connect.

Visit Us

www.kgob.com

Next Step

Complete our New Client Fit & Onboarding Form to begin exploring whether there's a strong mutual fit.



*KGOB CPAs & Advisors
Professional Services*