

CLIENT ACCOUNTING & ADVISORY SERVICES (CAAS) ENERGY:

# MINERAL & ASSET MANAGEMENT

Our team of Mineral & Asset Management professionals is comprised of exceptional individuals with extensive experience and knowledge of the Oil & Gas industry. We pride ourselves on our industry backgrounds and our dedication to providing unparalleled client service. In addition, our Mineral & Asset Management solutions are second to none, offering comprehensive and effective strategies for maximizing the value of mineral assets.

## SERVICES OFFERED

### Services Offered to Alleviate & Scale Your Operations Teams



- » Asset Organization & Collection of Documents
- » Proactive Land Management
- » Routine Production Volume & Deduction Reviews
- » Cutting Edge Software Access with a Map & Well Data
- » Payment & Protesting of Ad Valorem Taxes
- » Monthly, Quarterly, or Annual Reporting
- » Deposit Services
- » Invoice/JIB Tracking & Payments
- » Revenue Disbursements
- » Suspended/Escheated Funds Research
- » Division Order Review
- » Lease Negotiation and Marketing
- » Communication with Operators and Regulators
- » Surface Management and Negotiation



## ADDED VALUE

Our all-in-one solutions simplify the management of your accounting and technology needs, while our team of advisors are available to guide you through any obstacles that may arise. Through our budget-friendly services, you can rest assured that your finances are in good hands. As your business grows, our flexible solutions will grow with you, freeing you up to focus on running your business while we handle the accounting details.

## THE WHITLEY PENN DIFFERENCE

Whitley Penn is the 35<sup>th</sup> largest firm in the nation based on 2024 rankings in *Accounting Today*, 35<sup>th</sup> in the nation based on the 2024 rankings in *INSIDE Public Accounting's* "Top 100 Firms", and one of the fastest growing firms in the nation. We have an extensive team of experienced audit, tax, consulting, and valuation professionals that we will be able to draw upon as needed.

We are service oriented, and we believe in and understand the difference between deadlines versus guidelines. We will do everything possible within our process constraints to meet and exceed your expectations.

## CONTACT US



**David Welsh**

Mineral Assets Managing Director

 [David.Welsh@whitleypenn.com](mailto:David.Welsh@whitleypenn.com)

 713.487.4800



**Buffie Campbell**

Mineral Assets Senior Manager

 [Buffie.Campbell@whitleypenn.com](mailto:Buffie.Campbell@whitleypenn.com)

 214.393.9305



**Jason Fitzgerald**

Mineral Assets Manager

 [Jason.Fitzgerald@whitleypenn.com](mailto:Jason.Fitzgerald@whitleypenn.com)

 817.259.9267