

CLIENT ACCOUNTING ADVISORY SERVICES (CAAS)

OUTSOURCED ACCOUNTING, FINANCE, AND ADVISORY

By outsourcing your accounting and finance operations to our firm, you will have access to your financial data from anywhere, on any device, allowing you to focus on your business operation and goals. We are an innovative, full-service accounting and advisory firm. We listen to your current needs and future goals, then develop a customized solution specific to your organization. We will work with you to identify the best software and technologies to streamline and automate your back-office accounting and finance operations and leverage our people to be your forward thinking trusted advisors.

WHY OUTSOURCE YOUR ACCOUNTING AND FINANCE FUNCTIONS

With our team, you will have access to top specialists, deep technical expertise, and a global reach. By outsourcing these function to our team, you will also be able to reduce your internal costs by eliminating human capital management and oversight, payout of PTO and fringe benefits, and cost of turnover for many aspects of your accounting needs.

OUR SERVICES INCLUDE MONTHLY RECURRING OUTSOURCED ACCOUNTING AND FINANCE FUNCTIONS SUCH AS:

- Day-to-day accounting and financial reporting
- Virtual controller services
- Virtual CFO services
- Accounting technology implementation and integrations

Through our various levels of services, we have the capabilities to be your full back-office accounting and finance department or supplement your existing team. You'll also be provided with valuable insights to streamline your processes and analyze your financial data. From transactional accounting (e.g., general ledger coding and bank reconciliations), business processing (e.g., accounts payable and bill payment), financial reporting, to controller and CFO level services, GAAP compliance, and system implementations, we expertly manage your business's financial operations.

OUR EXPERTISE

We specialize in closely-held businesses, largely concentrated in the following areas:

- Professional service firms
- Technology and SaaS companies
- Life Sciences & Pharmaceutical companies
- Real estate