

HOW A CFO WORKS WITH A CPA

CFO Service LLC understands and respects the trusted relationship that a client has with their CPA so we built our firm around providing services that enhance that relationship. Whether it's providing client accounting so CPA firms remain independent for external reporting purposes or providing timely and accurate year-end work papers, the goal is to deliver the best cost effective solution for your client while never compromising the trusted relationship.

CFO Service LLC brings executive financial management to your clients that is cost effective and timely. We take the worry out of monitoring and controlling internal financial systems so the CPA firm can be confident the accounting is properly recorded and up-to-date. This also allows the CPA firm to build more value with their clients through consulting in more technical areas including tax planning, business valuation, succession planning, costs segregation studies, transfer pricing and financial reporting.

When a CPA refers CFO Service LLC, they can expect:

- To retain control of your client relationship
- To interact with a 25 year financial professional who understands how to effectively work with a CPA firm and enhance the CPA/client relationship
- To always be informed when there are changes to business operations
- To be kept abreast of developing and/or shifting business circumstances involving a major decision
- To be informed of any state or federal correspondence or non-compliance notification
- To receive timely value-added analysis and consulted with when important decisions are being considered
- To receive timely, accurate and consistent accounting work papers on a monthly, quarterly or annual basis
- The establishment of standard operating procedures to monitor and control internal financial processes
- To receive monthly or quarterly interim financial statements

Additional client support services:

Your client will also receive the value of having a seasoned CFO with experience in managing many backroom processes including:

- Human resources and benefits management
- Information technology application and implementation
- Risk management insurance quoting and purchasing
- Multi-location telephone and network implementation and support
- Bank relationship management