

## What Your CPA Firm Can Do for You

Smaller CPA firms are great business advisers to the companies in their communities. CPAs have long been the trusted business advisers for their clients, providing services to meet a wide range of business needs. Their services might include not only audit, accounting and tax, but also information technology, strategic planning and business valuation, as well as personal financial planning, estate planning and general business consulting.

For those reasons, companies have long turned to CPA firms to help them understand and address their most pressing business questions. And smaller CPA firms don't simply deliver services, they provide the kinds of customized, hands-on advice and insights that their clients need to achieve their business goals. This brochure will explain what you should consider and inquire about when choosing a CPA firm.

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## Take the First Step

**Would you like to learn more about all a smaller CPA firm has to offer?**

If so, please contact:



America Counts on CPAs



Your Money. Your Life.  
[www.360financialliteracy.org](http://www.360financialliteracy.org)

## The Smaller CPA Firm: Your Trusted Business Adviser



Advice from CPAs

## The Small CPA Firm Advantage

What should you expect when you work with a smaller CPA firm? Business owners often have many questions about what a professional services firm might have to offer. When you meet with CPA firm leaders, ask about the following advantages:

### ■ A personal approach

At a smaller CPA firm, you're not just a number. CPAs in smaller firms are deeply familiar with the details of their clients' organizations, which means that they develop a thorough understanding of your business. As a result, they are able to offer customized, proactive advice that will help you anticipate challenges before they occur and identify emerging opportunities. They create services to meet your needs, rather than offering standard one-size-fits-all packages.

*Smaller CPA firms offer customized, proactive advice that will help you anticipate challenges before they occur and identify emerging opportunities.*



*At a smaller CPA firm, you're not just a number. You can expect prompt responses to your calls or e-mails from someone you know.*

### ■ Familiar faces

When doing business with a large organization, you may have found yourself leaving endless messages or working with junior staff who are unfamiliar with your company and its needs. When you work with a smaller CPA firm, you should expect a prompt response to your calls or e-mails from someone you know. In your initial meeting with a CPA firm partner, ask if he or she will be available to you as the engagement progresses and be involved in the details of the firm's work for you. That kind of personal attention is standard procedure at smaller CPA firms.

*Because firm leaders are involved in each engagement, you enjoy a high level of quality for every service.*

### ■ Expectations are met

At a smaller CPA firm, each client counts. As a result, CPAs meet their deadlines and deliver on their promises. Because firm leaders are involved in each engagement, you can expect a high level of quality for every service. CPA firm partners can tell you more about their commitment to meeting client expectations.

*CPAs develop strong and lasting relationships with their clients because their own success depends on your success.*

*Smaller CPA firms maintain relationships with a network of other professionals who can meet their clients' varied business needs.*

### ■ One-stop shopping

Smaller CPA firms have developed a way to offer customized, hands-on service as well as all the resources of a much larger organization. They do this by maintaining relationships with a wide range of other professionals who can meet their clients' varied business needs. These professionals might include bankers, attorneys, insurance brokers and others who serve small to medium-sized businesses. CPAs seek out the most respected professionals in their fields and then work in collaboration with them as clients' needs arise. On a more informal level, this network of professionals also makes it possible for CPA firms to get quick answers to client questions in areas outside their own specialties. Ask your CPA firm about their own network of business contacts.

### ■ A true relationship

CPAs develop strong and lasting relationships with clients in their communities. Their own success depends on your success, so they work hard to create strong and mutually beneficial relationships with clients. Ask CPA firm leaders about how they've helped other clients achieve their business goals.