

# Client Accounting & Advisory Services

CAAS QUARTERLY UPDATE | VOL. 1



presented by:

**crr**CPA

Welcome to the first edition of our **Client Accounting & Advisory Services (CAAS) Quarterly Update**. Here you'll find impactful news, insights and advice from our expert staff, and helpful recommendations as it relates to standardizing your accounting processes.

Now more than ever, successful companies are leveraging Client Accounting & Advisory Services (CAAS) to grow their business. In fact, in a recent bill.com survey, respondents said that outsourcing accounting tasks helps them make better business decisions and creates opportunities for increased ROI.

Here are a few other things business owners have to say about using CAAS:

- **80%** say it affords them more time to focus on their business
- **68%** say it makes accounting easier and more efficient
- **53%** say they worry less about mistakes

## INSIGHTS FROM OUR EXPERTS

### **Saving Time on Accounts Payable.**

On a list of things you like to do, paying bills likely ranks somewhere near the bottom. Which is not surprising since it's time-consuming, prone to errors—especially if paper is involved—and fixing mistakes can be challenging at best. [Read more.](#)

### **How to Simplify Your Remote AP and AR Process for Greater Visibility.**

Are you spending too much time trying to keep track of your cash flow? Many business owners are choosing to streamline their processes by working with a Client Accounting & Advisory Services (CAAS) team, a group of specialized accountants who provide a tailored suite of services to simplify your accounting processes. [Read more.](#)

### **It's Time to Build Your Tech Stack**

Developing a suitable set of technology solutions—often called a technology stack—helps businesses streamline their operations and empowers them to work efficiently and effectively in multiple work environments. Our CAAS team can assist you to custom-build your own tech stack. [Learn more.](#)



**IN THE NEXT ISSUE:**

Our CAAS team works with clients in various industries. Our Spring issue will showcase a benchmarking survey on specific industries to demonstrate how we help CAAS clients to understand their specific situation and provide improvements and solutions to problems discovered. Please stay tuned!

**LOOKING TO STREAMLINE YOUR ACCOUNTING?**

We're ready to help you quickly and easily leverage our platform so you can stop struggling with your accounting processes and start enjoying positive results. With our CAAS team on board, you'll have more flexibility, control, insight, and peace of mind so you can take your business where you want it to go. Why waste time wrestling with your bill management? You've got better things to do.

REQUEST MORE INFORMATION

**MEET THE EXPERTS**

Our Client Accounting & Advisory Services team is lead by Nicholas Sampson and Wendy Li.

**Nick** is a Manager at CRR and has been practicing in public accounting since 2012. He has extensive experience providing tax and consulting services to closely held businesses with a focus on state and local tax compliance issues. He manages the Client Accounting & Advisory Services division where he consults with businesses of varying sizes and complexities, helping them effectively optimize their financial goals.

[Learn more about Nick.](#)

**Wendy** is a Manager at CRR and has been practicing public accounting since 1997, both in the US and in China. In addition to providing Client Accounting & Advisory Services, she has extensive experience in financial statement audits, in tax return preparation for individuals, businesses and nonprofits, and in payroll filing and SOX internal control testing.

[Learn more about Wendy.](#)

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