



## Maximize Profitability with the Analytix Solution for CPAs

Most companies consider their CPA firm an invaluable partner to their business operations. In addition to providing financial counsel, many CPA firms frequently find themselves managing or organizing their clients' bookkeeping and financial records, as well. Although necessary, this is not where a CPA's expertise is best leveraged.

At Analytix, we've created solutions specific to the needs of CPA firms. Depending on a firm's needs, we can provide the resources CPAs require to confidently delegate the more tactical accounting functions to trained accounting and bookkeeping professionals, thereby providing the CPA with more free time to focus on consulting services and proactive, client value-added work. The Analytix team provides scalable services ranging from bookkeeping to Controller and CFO level services, so we can augment an existing staff of accountants during peak periods or act as another resource that provides additional, high-level, financial reporting to clients.

Our accounting solutions and financial record preparation can be presented to a firm's clients as a referral, semi-private label, or private label, packaged under the firm's name. Similarly, CPA firms can leverage our secure web portal to provide clients with remote access to customized financial reports or integrate our electronic document management system into their processes to facilitate document submissions, organization and tracking. We automate accounting tasks and functions wherever possible to maximize efficiency and ensure data integrity.

## CPA FIRMS

### Benefits

Increase firm's profitability by focusing on higher revenue generating functions

Maximize efficiency by leveraging expertise of trained professionals

Customize financial reports based on client needs

Low or no technology investment

Assurance of data integrity due to automation

“Many of our clients do not require a full time employee at the controller or CFO level. The financials compiled and submitted to us by Analytix makes it seem as if our clients do have that high level staff member. Having Analytix involved makes our job and our clients' jobs easier.”

Harry Raphael, CPA  
BOSTON, MA

### About Analytix Solutions

Businesses which are positioned for growth turn to Analytix Solutions for scalable, single source, business solutions. We provide small to mid-sized businesses with a full range of accounting services, ranging from bookkeeping to CFO services, in addition to accounting systems automation and integration.



Analytix Solutions provides services that are a win-win for both CPA firms and your clients.

### ► Services for CPA Firms

- Organized, “clean” books which are beneficial for the efficiency and profitability of assurance services
- Electronic document management system
  - Allows for attaching source documents to transactions, such as PDF of an invoice to a QuickBooks journal entry
  - Access to a document library for filing non-transaction documents, such as monthly bank statements
  - MA Privacy Law compliant way to access and share documents with clients
  - Remote access to client files 24/7 for designated, approved staff members
- Custom reports created by Analytix Solutions; generated on-demand for client meetings to aid discussion and lend insight on client business planning and profitability
- Option to introduce web portal and bookkeeping services as referral, semi-private or private label
- Scalable, alternative resource to augment firm’s existing bookkeeping staff

### ► Benefits to CPA Clients

- Support business growth without adding headcount
  - Make your team more efficient
    - We work with existing accounting staff to eliminate repetitive, non-thoughtful work
  - Elevate your team to value-add activities which is motivating
- Integrate data systems
  - Connect POS/Payroll/Accounting/Time & Billing/Expense Reports/Client Database systems
  - Eliminate double-entry and minimize errors associated with manual data entry processes
- Scalable Controller/CFO services
  - No more "glorified bookkeeper as a CFO", "CFO doing bookkeeping", or lack of strategic thinking from missing a CFO
- Custom reports and solutions for your business
  - Technology expertise to write an application for automating various daily activities
  - Find what drives business to determine efficiencies and generate excitement with forward looking plans instead of historical data
- Electronic document management system
  - Automate manual processing
  - Access documents anytime, anywhere
  - Save space while reducing storage of paper files

Call us today for a free analysis of your firm's business processes or accounting systems.