



You run your **FIRM.**
We'll handle the **NUMBERS.**

Top 5 reasons
**Financial Service
Professionals**
should leave the
accounting to us





Financial service professionals are focused on what they do best: financially advising clients. While clients come first, financial service professionals also have to deal with administrative requirements, staffing, investment management and tax strategy. With all that's involved in running a successful firm, what financial service professional has time to do the accounting...and do it well?

The accounting function is at the heart of a profitable, successful financial services firm. And, typically, even the most passionate of financial service professionals do not make the best accountants. To ensure that your firm consistently hits the Key Performance Indicators (KPIs) that lead to long-term profitability, let our team handle your accounting.

BOSS™ (Back Office Support System) is our outsourced accounting service—where our expert team serves as your “internal” accounting department. We handle the day-to-day accounting work while also serving as your advisor to ensure you understand the numbers and make informed business decisions throughout the year. Consider all the reasons you should leave your accounting to us:



① **Trusted accounting resource**

You can trust our team to handle everything from accounting and bookkeeping to payroll and tax. And because we are familiar with your day-to-day operations, overhead structure, and billing routines, we are uniquely qualified to handle your back office accounting work—freeing you to focus on your clients.



③ **On-demand access to your data**

Our services are supported with the most advanced technologies. This ensures an automated, streamlined work process that helps us deliver exceptional service. Our online platform supports a collaborative workflow and offers you 24/7 access to your data and documents.



⑤ **Security**

Confidentiality of financial information, including employee benefits and wages, ranks high in importance. When accounting is handled in-house, it's difficult to maintain privacy of information and ensure that proper controls are in place. BOSS offers a third-party administrator (our firm) to monitor and manage the accounting function, resolving data privacy and control issues.

② **Dedicated advisor**

Not only can our team handle your accounting tasks, but you also get dedicated business advisory support throughout the year. We'll analyze your numbers and help you make sense of your finances to support informed, business-savvy decisions.



④ **Budget-friendly monthly fee**

BOSS provides complete accounting and advisory services at an affordable fixed fee—so you never have to worry about hours adding up and variance in monthly accounting invoices. Outsourced accounting is also more affordable than a full-time in-house bookkeeper. In fact, many clients report a 50% reduction in cost.



Let us handle the **NUMBERS...**
so you can get back to what you do best.

BOSS is the answer. Years of dedication to client service combined with our experience working with financial service professionals ensures accuracy of financial data and reporting. Even better, you are supported within an on-demand cloud-based platform, so you always have access to your data.

Contact us today! We are happy to walk you through the BOSS service and show you why it's better to leave the accounting to us.



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