



CLIENT ACCOUNTING ADVISORY SERVICES (CAS)

OVERVIEW OF SERVICES

Businesses today need to optimize their accounting and finance functions and align them with their goals in order to grow. Improving cash flow, maximizing efficiency and minimizing costs are all important considerations.

Anchin's CAS group provides services geared toward managing your accounting and finance responsibilities and improving your company's performance and bottom line.

We have a proven track record of assisting clients who are operating in a remote work environment.

Engaging a highly-rated accounting, tax and advisory firm with a wealth of diverse experience is the preferred option for many companies. By leveraging technology, we use critical business data to partner with you to deliver the tools and guidance you need, where and when needed, in order to help you make the best-informed decisions for your organization.

Anchin's expertise encompasses a wide range of industries, including consumer products, technology, manufacturing and distribution, life sciences, public relations and advertising, real estate, construction and architecture and engineering.

BENEFITS & OUTCOMES

Many organizations have found that outsourcing their accounting and finance functions adds efficiency and allows management to better focus on growth, operations and strategic initiatives. Management is also relieved of employee turnover, onboarding, training, PTO related costs and other overhead, resulting in cost savings and an improved bottom line. CAS services are especially effective for organizations that find hiring and training trustworthy accountants time consuming, costly and challenging.

Accounting services include:

- Bookkeeping
- Financial reporting
- Cash management and reconciliation
- Sales tax and other local tax compliance
- Payroll and benefit administration
- Bill payment services (bank and credit cards) – including expense tracking and expense allocation

Advisory services include:

- Budgeting – design, tracking and comparison
- Preparation for Mergers & Acquisitions
- Audit readiness preparation and assistance
- Cash flow projections
- Industry-specific analysis and benchmarking
- Developing performance summaries, including KPIs and dashboards
- Recommendations for business improvements

Additional benefits may include:

- Access to our team – Our experienced team of financial executives and industry experts is available to you at all times, to provide a range of services and bridge the gaps in your accounting.
- Scalability of resources and workforce – Whether you need accounting or CFO-level advice, we can provide the appropriate services and expertise at the right time. If the size and scale of your organization change, we can immediately adapt our services to your needs.
- Seamless integration with your team – Working with your existing leadership and staff, the accessibility and scalability we provide creates a smooth process as your organization changes.
- The Anchin network – Our team of industry thought leaders and experts provides in-depth knowledge across the gamut of business services.
- Best practices – Implementation of best practices as they relate to reducing redundancy, improving statutory compliance, technology and industry challenges. This also enables us to provide you with more accurate and timely reporting and the ability to make real-time adjustments for your organization.

FIRM OVERVIEW

Founded in 1923 in New York City, Anchin, a public accounting and advisory firm, is recognized as a top-tier firm nationwide in terms of its quality, management, scope of services, and work environment. With a diverse staff of approximately 375, including 56 partners and principals, and numerous specialized industry and service groups, our full-service firm provides companies and individuals with a wide range of accounting, tax and advisory services.

YOUR CAS TEAM

Building on our reputation for quality and reliability, Anchin created a CAS team that is led by industry expert partners, including a veteran CFO/COO with over thirty years of experience. Our team leaders will personally be involved in all aspects of your work and will be your main points of contact. An industry expert will also be assigned to serve you.



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