

Client Accounting & Advisory Services



Cover & Rossiter is an award-winning CPA advisory firm recognized for providing high-quality advice and personalized service to enable our clients to achieve their objectives.

Our **Client Accounting & Advisory Services (CAAS)** team is comprised of dedicated professionals committed to providing services designed to streamline your organization's accounting processes, while improving internal controls, in order to provide greater asset protection. Our services are ideally suited for many types of organizations including Nonprofits, Medical or Dental practices, Investment Management Firms, Manufacturers, Law Firms, Retail shops, Real Estate Sales and Property Management, and more. We deliver solutions that not only save you money, but also create tighter controls to better protect your business.

Is Your Business Prepared?

Imagine your in-house accountant suddenly leaves and your business is stuck with fast-approaching deadlines. We've seen this situation occur and how businesses suffer because they're not prepared for it. Here's how we can help:

- We provide consultations to clients to assess whether it is more cost-effective to outsource their accounting, either temporarily or permanently.
- We look at your operating expenses and other factors to determine recommendations that will ultimately improve efficiencies and effectiveness.
- We work with you to ensure your processes and controls are set up with safeguards to ensure minimal disruption should a sudden departure occur in the future.

For More Information: Contact Wendy Rafferty, WRafferty@CoverRossiter.com
Cover & Rossiter, P.A. 2711 Centerville Rd, Suite 100 Wilmington DE 19808 302-656-6632

Accounting Software Setup & Training

Our CAAS team provides software setup and training for several accounting software programs including: QuickBooks, Sage 50, and Bill.com.

There are numerous accounting software options available to businesses. Here are some questions you should consider when choosing your software:

- Do you need an industry-specific program (i.e. legal, medical, construction)?
- Do you need to track inventory?
- Do you bill your customers in phases; do you use estimates or quotes?
- Do you need a Point of Sale (POS) module?
- Will you have multiple users?
- Do you want access to your accounting software outside of your physical office?
- What kind of growth do you anticipate in your business?

Temporary / Permanent Accounting Services

The question of outsourcing some or all accounting services, either temporarily or permanently, should be reviewed periodically. Accounting services offered include the following:

- Assist with daily/weekly/monthly tasks, e.g. bank reconciliations, payroll processing, bill pay, etc.
- Evaluate current accounting department policies and procedures.
- Streamline processes and create standard workflows while focusing on internal controls to protect the organization.
- Identify improvement areas, i.e. software upgrades, staff training, and changes to policies.
- Assess and recommend procedures necessary for your staff to continue to perform, such as opening mail, making deposits, and other non-accounting tasks.
- Identify and provide higher-level services which C&R's experts are better equipped to perform, such as preparing financial statements, software set-up and training, budgeting, etc.
- We'll work with your new accountant to ensure they are properly trained and have the skills needed to successfully perform their job.



Contact Us Today for a Complimentary Consultation on How Our Client Accounting & Advisory Services Team Can Maintain the Books While You Grow Your Business!

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