

# CASE STUDY: LOCAL CONNECTICUT CPA FIRM

*How a local Connecticut-based CPA firm benefits from The Innovative CPA Group's back office services.*



## SUMMARY

The two partners of this CPA firm have fostered strong relationships with their clients. However, their substantial workload presents a challenge in completing tasks promptly.

## SPECS:

**Company Size:**  
4 employees

**Service Area:**  
Southern Connecticut




The two partners of a local CPA firm in Connecticut have fostered strong relationships with their clients. However, their substantial workload presents a challenge in completing tasks promptly. Our firm was referred to them by one of our ambassadors. By collaborating with The Innovative CPA Group, not only did we help alleviate some of the pressure on their firm and staff, but we also enabled them to retain a few significant clients they might have otherwise lost.

## WHAT WE PROVIDE:

Throughout our relationship, we successfully conducted a comprehensive review, carried out two thorough audits, and provided intricate real estate taxation services for four esteemed high-net-worth clients within their portfolio.

## OUR IMPACT:

By outsourcing these services, the firm was able to maintain its current scope of work with each client, preventing potential loss to larger CPA firms. Moreover, our partnership not only relieved the firm from the pressure to expand their services but also enabled its team to refocus on their core competencies. As a result, the quality of work for their existing client base improved significantly, leading to enhanced customer satisfaction.

-  ALLEVIATED PRESSURE TO PERFORM SERVICES.
-  RETAINED LARGE CLIENTS WHO MAY HAVE SWITCHED CPAS.
-  SUBSTANTIAL TAX SAVINGS FOR CLIENTS.