

## What is the Best Way to Integrate Wealth Management?

The merits of adding wealth management services to your CPA firm are obvious, but the challenge is, what's the best way to make it happen?

## Experience and Expertise

Our firm has over 20 years of excellence and demonstrated profitability working with CPAs. Over the years, we have developed tried and true best practices.

## *Helping CPAs Grow Their Revenue and Differentiate Their Firm by Integrating Wealth Management Services*



How can a busy CPA possibly have the time to learn about wealth management and develop the expertise necessary to provide the excellence that clients expect? That's where CPA Squared comes in.

We understand that CPAs are busy running their firms and do not want to spend a lot of money upfront to add new services. The CPA Squared team coaches CPAs to successfully add wealth management services to their existing practices with low upfront costs. We also know that most CPAs are new to wealth management, so we offer education, support, and service every step of the way.

**Our program makes it easy for your firm to complete the process within 60-90 days and offers benefits including:**

1. Demonstrated profitability
2. Step-by-step implementation process
3. Experienced advisory team
4. Low upfront costs
5. Outstanding service and support
6. Over 20 years of excellence

Incorporating wealth management into your services doesn't have to be an overwhelming and time-consuming process. By partnering with us, you gain access to an experienced advisory team with a level of expertise not often found in a CPA firm.

We are ready to assist with our trademark spirit of excellence and the highest level of service. Our outstanding resources and support will empower you to exceed your clients' expectations and build a superior firm.

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## CPA Squared

The CPA Squared program is an easy-to-implement turn-key program to successfully integrate wealth management into CPA Firms. We don't just show you how to incorporate wealth management; we partner with you every step of the way to ensure a seamless and successful integration.



## Are You Meeting Your Clients' Needs?

Today's clients are busier than ever and research shows that clients want CPAs to be more involved in helping them make informed decisions about their financial future. To better meet the demands and expectations of their clients, many CPAs are exploring ways to expand their services beyond tax preparation, accounting, and auditing.

The challenge is that most CPAs don't have the time or expertise to successfully integrate wealth management services into their existing practices. We offer a time-tested program with demonstrated success to help CPAs offer their clients more.

## What Are the Benefits of Offering Wealth Management Services?

The revenue potential in adding wealth management services to your firm may be as high as 10–20 percent of adjusted gross accounting billings. While increased revenue is one benefit, the first place you will see the impact of adding in wealth management is in client satisfaction.

Clients today are looking for comprehensive professional support with their finances. Not only is a more satisfied client more likely to continue doing business with you, they are more likely to refer their friends and colleagues. As client satisfaction increases, so do client retention and referrals.

Incorporating wealth management services also diversifies your practice, giving you a competitive advantage. In a sea of CPA firms that all seem to do the same thing, a firm that offers wealth management in addition to taxes, accounting and auditing is likely to attract more prospective clients' attention. In today's fast-paced world, everyone is seeking to simplify their lives and save time. Why would a client want to go to a CPA and a financial advisor if they can get the same services all in one place through someone they already know and trust?

CPAs that have integrated wealth management services are able to achieve:

- Increased revenue per client
- Improved profitability as a firm
- Diversification of their practice
- Higher client satisfaction
- A competitive advantage in the CPA market
- Higher client retention
- Increased referrals

Our proven model and step-by-step process can help you strengthen your current client relationships as well as develop new ones. Integrating access to wealth management services may empower you to exceed client expectations and position your firm to outpace the competition. Our approach allows you to add access to wealth management services without disrupting your core business model.

## Get Started Today!

To learn how to position your firm for the future by integrating wealth management services, visit our website to read our frequently asked questions and learn more about our process.

CPA Squared is ready to help you improve client retention, increase revenue and outpace the competition. For more information about our program, contact us today:

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