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CPAs are on the front lines with clients every day. As a CPA, we see our clients' struggles, their wins, their vulnerabilities, and their strengths. Our relationship is critical, and it is very important for us to be seen as their number one trusted advisor.

To do so, it's critical for us to know about all the new ways our small business

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new technology and how being aware of these new options positions us as a much-needed resource for your clients and prospects.

What's In The White Paper?

I first talk about what it means to be a “Radical CPA” – a growing movement within the accounting profession that focuses on communication and transparency. It's about having the answers to questions that our clients haven't asked yet, rebuilding a firm from the foundation up, and knowing about the new resources available for smaller firms that were once only accessible to larger ones.

This white paper explores how clients can gain access to capital to run their business.

What Does The White Paper Address?

The Slow Death of Traditional Financing

About 70 percent of small businesses want loans below \$250,000. Unfortunately for those business owners, they are often turned down because they don't have a return on investment for many banks. CPAs have a great opportunity here to fill in the gaps and help their clients find alternative options.

The Expanding Role of the CPA

As a CPA, if you thought you were busy before, your job is about to get that much more demanding. The good news is you have more tools at your fingertips to help you help your clients.

The Benefits of the Cloud

We all know the cloud is not going away. It has many advantages, and because you

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and the next three months. In this section, I outline a whole list of other strategies to help you get started in cash flow consulting.

Be Educated, Not Fearful

As with any change, there will be naysayers. In the white paper, I address the concerns some CPAs have with using online funding tools as well as the myths about them. I also discuss how transparency is the most important benefit an alternative funder offers.

Alternative Financing: What CPAs Need To Know

A client is most vulnerable when they hit a cash flow crisis. It's confusing and embarrassing, and they may not know where to turn. As a CPA, you can offer them judgment-free advice. Don't back away from a difficult conversation where you may be able to help them, increase trust, and gain new business.

What Opportunities Are You Missing?

Think about it. If you don't know what is out there you are putting yourself and your firm at risk. Be a leader. Demonstrate you know the alternatives and options that can make your clients' lives easier. It's time.

Identifying Solutions For The Small Business

Many CPAs can get caught up in their own conservative values around the cost of borrowing money. They forget the missed opportunity for the entrepreneurial business owner to accept the risk and use it to fuel business growth. Don't lose that customer. You have the knowledge and insight your client needs, and pairing it with the right tool can change not only your customers' business but yours as well.

My white paper, “The Expanding Role of the CPA: Finding Tools to Fill the Gaps,” in

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