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FIRM MANAGEMENT

New Bundle Helps PASBA Members Better Serve Clients

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Xpitax, which makes tax and accounting outsourcing solutions for accounting professionals, announced the availability of the custom solution on Wednesday. The system has been tailored to the specific needs of members of the Professional Association of Small Business Accountants (PASBA), and includes outsourced accounting services, the XCM workflow software, and customized on-boarding services, as well as expert consulting by a practitioner with deep experience in both PASBA processes and Xpitax outsourcing services to help members ramp up quickly to maximize the value of this service.

Xpitax will showcase the new offering at PASBA's 2014 Spring Marketing Conference in San Juan, Puerto Rico, May 12-15.

"I have been using Xpitax's services for five years, which has allowed me to focus on delivering quality advice and consultations to my clients," said Donna Bordeaux, CPA, Partner at Bordeaux and Bordeaux. "I see a real need among my fellow PASBA members trying to identify a solution that will enable them to really focus their time

on delivering high value services to the small businesses they serve. When Xpitax approached me about working together to deliver a PASBA offering, I saw it as a win-win. The goal of the group is to share advice on best practices and efficiencies and I truly think these services have revolutionized our practice. I look forward to helping many other PASBA members realize these great efficiencies.”

The small businesses that PASBA serves rely on member firms to act as a trusted financial partner to give them sound advice essential to helping them run successful businesses. Xpitax Accounting™ enables firms of all sizes to offer their small business clients a full suite of client accounting services, utilizing experienced bookkeeping and accounting professionals for routine work – including bookkeeping, reconciliation, and monthly financial statement production – while empowering internal staff to focus on value creation and client service.

“We are thrilled to be working with forward-thinking professionals like Donna and her colleagues at PASBA,” said Bob Locke, VP of Sales and Marketing, Xpitax. “Their focus on adopting solutions that empower them to focus on value creation for clients is a perfect fit for our professional outsourcing services. Together with Donna's expertise, we're committed to the success of the entire PASBA community through this offering.”

PASBA members signing up for this Xpitax service will have a dedicated team of knowledgeable professionals, based on the scope and volume of the monthly work, that will perform a variety of client accounting services according to the PASBA model. Each team is overseen by an experienced supervisor, many of whom have advanced degrees as Chartered Accountants.

All Xpitax team members will have specific training in the PASBA model, preferred technologies and processing guidelines, and the firm's on-boarding process and consulting will be directed by Donna Bordeaux. The PASBA solution will also include the award-winning XCM workflow automation software, specifically designed to control such processes, all for a flat monthly fee – giving members greater flexibility and predictability in their staffing resources.

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