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WEBCASTS

CPE Webcast August 18: Increase Your Value as a Client Advisor

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Date: Thursday, August 18, 2022

Time: 11:00 AM EDT / 10:00 AM CDT / 8:00 AM PDT / 3:00 PM GMT

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Duration: 1 Hour

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Fact: it costs an accounting firm 5 times more to acquire a new client than to keep an existing one*. That makes maximizing your firm's value in the eyes of your clients essential to ensure they remain your client for years to come. Aside from delivering an opinion, the audit presents opportunities to provide observations, expert recommendations, and strategies that will help your clients achieve their financial and operational goals. Data analytics maximize the opportunities to uncover those valuable client insights that are often missed, putting auditors in a unique position to provide huge value as client advisors.

During this session our industry thought leaders, Michael Holmstrom/Sax LLP and Stefan Davis/Wolters Kluwer, will discuss:

- How to collect and analyze data to uncover insights and present them to your clients.
- Real-life examples of how TeamMate Analytics is turning auditors into valued client advisors.
- A look at technology that makes the process easy for the entire audit team.

Join us to find out how data analytics can supercharge the value you provide as part of your audits.

Any CPA firm partner, manager, or staff that performs audit engagements on public or non-public entities, and is interested in learning more about how to increase the value of their audit work, will benefit by attending this session.

*12/29/2021 Truelist blog on accounting stats, <https://truelist.co/blog/accounting-stats/>

Program level: Basic (no prerequisites required).

Field of Study: Audit

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Presented by



Michael Holmstrom, senior audit manager at Sax LLP, is a New York CPA and has received his M.S in Accounting from SUNY Old Westbury. Michael has an extensive auditing background in real-estate, construction, manufacturing and distribution, healthcare, food and beverage and architecture and engineering. Additionally, he enjoys researching audit technology and gaining an understanding of how data analytics can help firms become more efficient. For example, with the use of Excel and other software, he has helped develop efficiencies and automation in the audit practice.



Stefan Davis is a Lead Technology Product Manager in the Audit Product Management team and leads the data-driven audit and global audit initiatives. Stefan is one of the original founders of TeamMate Analytics and joined Wolters Kluwer in 2017.

As a member of the Product Management team, he works with users to understand their needs for data driven audit and data analytics, and the development teams to develop solutions for those needs. He also works with Wolters Kluwer teams worldwide to develop next-generation audit tools for use internationally. He is also an ambassador for Data Analytics in the audit profession and has presented at numerous conferences around the world including Institute of Internal Auditors conferences in Dubai and Basel.

Prior to founding TeamMate Analytics, Stefan worked at KPMG for 9 years, predominantly in External Audit and Management Consulting, but also Internal Audit, Forensic Investigation and Transaction Services. He worked with a wide range of clients from

owner-managed businesses to FTSE 100 companies, but his favorite Audit client was Aston Martin!

Stefan received his MBA (Finance) from The University of Manchester and his MEng in Mechanical Engineering from The University of Bath. He lives near Birmingham, UK with his wife and their two children. He's a guitarist in a band and spends much of his spare time building guitars and doing home improvements.



Gail Perry, CPA, is the editor-in-chief of *CPA Practice Advisor*. A veteran of accounting journalism, she also speaks at many accounting events, trade shows, and webinars. Gail is the author of over 30 books (including *Mint.com For Dummies*, *The Idiot's Guide to Introductory Accounting*, and *Surviving Financial Downsizing: A Practical Guide to Living Well on Less Income*), and she maintains a small tax practice. Gail is a graduate of Indiana University where she earned a bachelor's degree in journalism. She returned to school to study accounting at Illinois State University, earned her CPA, and worked for Deloitte in Chicago for several years as a state and local tax accountant. She has taught introductory accounting and personal finance courses, and she is a former computer applications instructor at the Indiana CPA Society. Gail is a member of the AICPA's PFS Credential Committee.

This FREE online webinar is a continuation of *CPA Practice Advisor's* mission to provide unbiased, independent information on technologies available to practicing public accountants and tax professionals.

Special thanks to our sponsor for supporting this educational session:



Wolters Kluwer Tax & Accounting is a leading provider of software solutions and local expertise that helps tax, accounting, and audit professionals research and navigate complex regulations, comply with legislation, manage their businesses and advise clients with speed, accuracy, and efficiency – so they maximize the impact they create for their clients. Our focus is giving tax and accounting professionals the ability to grow, manage and protect their business and their clients' businesses in a fast-moving and ever-changing world. It means that firms can stay ahead of the pack, take advantage of new technologies, transform, and capitalize on new opportunities.

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