

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

client advisors.

Jul. 16, 2022



Wolters Kluwer

[View the Archived Webinar](#)

This webinar was held on Thursday, August 18, 2022.

**Sponsor:** Wolters Kluwer

**Duration:** 1 Hour

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

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

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

**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.



Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

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,

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

highly innovative 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.

Wolters Kluwer Tax & Accounting is part of Wolters Kluwer (WKL), a global leader in professional information, software solutions, and services for the healthcare; tax and accounting; governance, risk and compliance; and legal and regulatory sectors. We help our customers make critical decisions every day by providing expert solutions that combine deep domain knowledge with advanced technology and services.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved