



COMPLIANCE AUDIT SERVICES



Executive Summary

We're ready to help.

The best accountants help you stay on top of all your reporting requirements and inform you about best practices in accounting and financial management, so you can focus on building your business. This can take many forms, but might include:

- ▲ Evaluate and understand how your accounting and finance functions compare to other companies in your industry
- ▲ Improve your internal controls and the processes which protect your assets
- ▲ Learn about new accounting rules, tax laws, and other compliance issues which will impact you
- ▲ Help you keep up with new accounting systems and automated systems that can get you quicker financial reports for lower costs.

Alta CPA Group specializes in performing audits for a wide range of entities. We also perform audits for franchisors, government contractors, nonprofits, consulting firms, and employee benefit plans. This means that our team brings you a level of expertise that few firms can match. As a result, your audit will be performed on time and the burden on your staff will be minimized

Your reporting needs are just the beginning.

There are many firms who can accurately prepare a set of financial statements and your tax returns. With Alta CPA Group, you get a lot more than just a set of financials; you get the support of accounting and financial reporting experts throughout the year. When questions come up – technical questions, software questions, tax law questions – we are there to support you and augment your financial team's knowledge.

We take particular pride in our forward-looking approach to accounting and financial reporting; we are early adopters of tools like online general ledgers, automated bill payment, and AI systems for audit and attestation engagements and we take pride in helping our clients realize efficiencies with the new tools available. We will give you proactive guidance and information as circumstances change; when you need to make a lease vs. buy decision, or run projections for a new business line, or reduce the time it takes to collect your receivables, we are there to help.

Most importantly, we help you gain assurance that your team is getting it right – last year, currently, and in the future.

Profile of Firm

Firm Philosophy and Background

Alta CPA Group is a full service public accounting firm whose partners collectively have more than sixty years' experience serving a wide range of local, national, and international clients. We've got two offices in Maryland and a team of seventeen people, including five partners and thirteen accountants, dedicated to helping our clients find effective solutions to their accounting and finance challenges. We believe our clients deserve superior service and we will not provide anything less. We view attestation and tax services not as a burden, but as an opportunity to provide assurance to our clients that their records are accurate and their processes and procedures are effective. In situations where improvements can be made, we proactively educate our clients on how to achieve not just accounting compliance but efficiencies of operations, stronger internal controls, and best practices in governance. When clients are already performing at a high level, we keep you informed of changes in rules, regulations, and best practices to ensure continuing success.

Our culture of quality in everything we do will mean that your services will always be performed on time and by highly qualified staff. Throughout the year, as questions arise, you will receive fast, accurate, and meaningful answers to help support your business operations. An effective partnership between your auditor and your organization means regular, routine, and accessible communication.

Because we know the demands placed on your accounting function we can help you find answers which work for your organization and operations. We can translate financial statements, standards, and regulations into easily digestible information you can use for strong business decisions.

We have excellent staff retention - the majority of our team members have worked together for more than eight years. We offer industry-leading benefits, like fully paid health and disability insurance and unlimited vacation, because staff retention in our industry is critical to ensure smooth engagements for our clients. Your engagement team will be consistent and knowledgeable about your organization – you will not be meeting new accountants and training them on your company and processes each year. Our partners are hands on throughout the engagement process and during the rest of the year, providing you with expert assistance and advice when unusual transactions, new requirements, and new opportunities arise.

Alta CPA Group, like all certified public accounting firms, undergoes a peer review every three years – an audit of the auditors, to ensure that the services we provide meet the stringent standards of the American Institute of Certified Public Accountants. Peer review is designed to provide assurance that members establish and enforce an appropriate quality control system for their accounting and auditing practice. Our most recent peer review received a "Pass" rating, the highest available rating.

Alta CPA Group offers many services outside the financial statement audit, within the rules of independence, and for our outsourcing clients. For routine questions like talking through the appropriate recognition for a transaction, or discussing a new tax rule which may impact you, which don't require significant research, these tax, accounting, and consulting questions are included in our base fee. For larger consulting projects, we will discuss the scope and pricing prior to initiating work. Recent consulting engagements have included forensic investigations; general ledger/chart of accounts overhaul and redesign; training on reading financial statements and compliance rules; automating payables and building linkages between CRM software and the general ledger; selecting and implementing new accounting software; training accounting staff; assisting in the interview and hiring process for finance team members; HR compliance reviews; internal control analysis; and many others.