

The CPAConnect network is ‘Improving through Sharing’

CPAConnect, the nation’s fastest-growing network of local CPA firms, has helped members fulfill their goal of “improving through sharing” for almost 13 years.

CPAmerica International, one of the nation’s foremost networks of large CPA firms, launched CPAConnect as a companion network for smaller independent accounting firms in 1994. Since its founding, CPAConnect has grown to a membership of nearly 220 firms in 36 states.

During the past five years, the network has nearly tripled in size. Its growth stems mainly from providing many of the same programs and services offered by CPAmerica to its larger members but tailoring them to the needs and requirements of smaller firms.

“As a new member, I’ve found using and participating in the members’ discussion lists a great resource in answering interesting tax questions,” said Peter S. Wasik of Wasik and Associates, P.C., in Little Falls, N.J. “I have yet to tap all the resources provided by CPAConnect and its great Web site.”

Through CPAConnect, members have:

- Access to practice management and strategic planning advice to encourage practice growth
- The ability to benchmark with similar size firms across the country
- A noncompete agreement inherent with referrals
- The ability to provide valued clients with additional services
- The ability to engage proven marketing tactics in a cost-effective manner
- Practice continuation potential
- International referral capabilities
- An affordable membership dues structure in terms of available services and resources

Because it is backed by the resources and executive office staff of CPAmerica, CPAConnect can take advantage of valuable CPAmerica programs and services, including:

- **CPE training.** Called “the best custom CPE training available for firms of our size,” training opportunities are offered annually with nearly 20 separate courses, including sales and leadership.
- **Practice Management Survey.** One of the most thorough and comprehensive surveys available anywhere, the Practice Management Survey is a leading benchmarking tool to compare firm performance with similar practices throughout the nation.
- **Publications.** The monthly newsletters, *CPAConnections* and *CPAmerica’s Profit Sense* e-letter, are full of useful tips and information for the practicing CPA. Also available exclusively to members by subscription are four client newsletters – *Client Advisor*, *Financial Insights*, *Nonprofit Notes* and *Family Matters* – to send to clients to promote member firms’ services. Numerous other client newsletters, brochures, advertisements, Web content and other publications may also be purchased within specific areas.

- **Marketing services.** Members have access to a national marketing consultant, monthly toll-free Marketshare calls and plans and tools designed specifically for smaller firms.
- **Web development/technology.** All CPAConnect members are electronically linked for document sharing, e-mail and listserv networking. CPAConnect provides 24/7 accessibility on its members-only Web site.
 - **Listserves.** CPAConnect has more than 35 themed listservs for daily assistance and second opinions.
 - **Sharing library.** CPAConnect’s online sharing library makes sharing easy with access through the members-only section of the CPAConnect Web site. Members from around the country contribute proposals, surveys, engagement letters, tax opinions, client/industry presentations and much more for use by the members.
 - **Priority requests.** One of the most powerful tools available to CPAConnect members, a priority request is especially helpful when the needed information or assistance is time sensitive.
- **Consultants.** CPAConnect retains through CPAmerica nationally known experts to offer quick advice or in-depth expertise.
- **Annual roundtable and other conferences.** Members who attend are exposed to first-rate speakers and advice, as well as excellent peer-to-peer networking opportunities. A highlight of membership is the annual CPAConnect Roundtable, held each year in October, where members network and share ideas.
- **Preferred pricing.** Members can receive discounts from dozens of major national office supply companies, travel organizations, training institutes and other business groups.
- **International affiliation.** A strategic alliance with Horwath International expands CPAConnect and CPAmerica’s network to more than 10,000 CPAs and consultants in 400 offices around the world. Together, the revenues of CPAmerica/Horwath firms surpass \$2 billion.

Because of the principles of confidentiality subscribed to by each member of the CPAConnect network, members are able to openly discuss all areas of practice management in an honest, informational and noncompetitive way. Members agree that sharing with other member firms is CPAConnect’s most important advantage.

“It is nice to be part of this group and participate in the professional courtesy that this group shares,” said Scott Jones of J. Scott Jones, P.C., in Franklin, Ind.

After receiving timely answers to a recent tax question, Jones said he is grateful for the member responses that he found to be “consistent and to the point” – important attributes during tax season.

Membership in CPAConnect takes two forms. Either an existing CPAmerica member in a specific market area sponsors the firm or the firm simply joins as a non-sponsored member. There is no difference in the membership status within CPAConnect, but sponsored firms sometimes enjoy the added benefits of joint engagements and referrals. The potential also exists for the sponsored firm to become a future merger or acquisition candidate of the sponsor.

All members may avail themselves of the CPAConnect advantages because of the vision and leadership of the president and CEO of CPAmerica, Douglas H. Thompson, Jr.

Thompson is one of the most respected practice advisers in the country. He is known for his entrepreneurial leadership in creating new opportunities to keep member firms one step ahead of the competition.

As CPAConnect looks to the future, Thompson continues to repeat to members and staff the refrain that has been so instrumental to the phenomenal growth of the network and its firms: “Just imagine how much more we can achieve and how much better we can become just by working together.”

For further information regarding CPAConnect, contact Ernest Moyer, Director of Member Services at emoyer@cpaconnect.com or visit the web site, www.cpaconnect.com