

Improve Efficiency with Intelligent Accounting and Audit Tools

Brookfield, WI – In 2007 Kolb+Co. implemented Advance CPA audit methodology and tools in their firm. Michael Peer, CPA and shareholder, and all shareholders at Kolb+Co. agree there have been positive improvements in their firm, including spending less time completing forms, resulting in more time invested managing higher-level professional tasks such as addressing audit risk.

Firms utilize AdvanceCPA to better serve clients.

For Kolb+Co, a highly advantageous aspect of working with AdvanceCPA is their audit assessment tools. “The vast majority of our clients are in the manufacturing, construction and healthcare industries. A key factor in our firm’s decision to adopt Advance CPA audit tools was their depth of resources and support for these industries.”

AdvanceCPA provides industry-precise risk assessment templates that yield a more focused risk assessment completed by staff members who may have limited experience in auditing. “This tool allows our staff to utilize our clients’ time in the most efficient and productive way.”

Knowledgeable and accessible technical support.

AdvanceCPA provides industry-leading training and technical support, including introductory training to its methodology which thoroughly covers the new risk assessment standards. “Prior to our initial AdvanceCPA training, we received risk assessment training in the audit product we were using at that time. When we made the move to AdvanceCPA audit methodology, we approached their training by creating an agenda of what we expected to take away. As a result, our people were much more engaged in the instruction.”

AdvanceCPA methodology is easily understood by every staff member.

The shareholders at Kolb+Co. agree there is a huge difference when comparing AdvanceCPA audit tools to other products. “Advance CPA audit forms utilize drop-down boxes and suggestions that guide less-experienced staff through the risk assessment process. The integration of the forms within CaseWare saves time by eliminating redundant responses to the same questions across multiple forms.”



Revenue opportunities identified.

AdvanceCPA’s proven Smart Audit Intelligence tools allow Kolb+Co. to provide valuable ideas to their clients. “We utilize AdvanceCPA audit tools and reduce overall audit time while remaining in compliance with the audit standards.” The tools from AdvanceCPA are designed to implement an efficient audit process that identifies revenue opportunities and improves efficiency within a practice.

Kolb+Co.

Certified Public Accountants
Brookfield, WI
14 Shareholders, 100 Staff Members

Michael Peer, CPA & Shareholder Kolb+Co.



For nearly fifty years, Kolb+Co. has been the trusted advisor in providing integrated financial and business solutions spanning many industries.

“Our decision to adopt AdvanceCPA audit tools and methodology has allowed us to better utilize our resources including staff, junior accountants, and our partners time.”

~ Michael Peer, CPA

AdvanceCPA is a leading provider of intelligent tools to the accounting industry. We provide CPAs with audit and accounting tools, tax ideas and strategies, CPE programs and technology solutions.

AdvanceCPA is a division of RSM McGladrey, the accounting, tax and consulting firm for companies on the move. AdvanceCPA provides tools, methodologies and strategies developed by CPAs for CPAs. We distribute tools developed with input from RSM McGladrey as well as hundreds of firms and providers of high quality tools.

Our clients have unlimited access to our Help Desk Support Team that can help with any question or issue related to AdvanceCPA software and systems.

AdvanceCPA!

Tools, methodologies and strategies developed by CPAs for CPAs

- ▶ **Smart Audit Intelligence**
- ▶ **Proven Tax Tools**
- ▶ **CPE Programs**
- ▶ **Technical Support**

Learn more. Call Today.

866-849-3426

www.AdvanceCPA.net

AdvanceCPA Provides:

Smart Audit Intelligence using methodology to implement the risk-based standards in the most efficient manner for each client.

McGladrey Audit Performance System (MAPS) is the most efficient audit assessment tool available to CPA firms today.

McGladrey Program Generator makes many of the key benefits of Smart Audit Intelligence available to deliver program steps to both paper users and users of any paperless system.

Research/Support and Industry Core Manuals provide the foundation to improve your A&A practice's realization for audits, reviews, and compilations. Industry manuals and templates cover numerous industries.

Proven Tax Tools designed to implement an efficient process that will identify revenue opportunities and leverage efficiencies within your tax practice.

- Tax compliance tools - aid in client communication, practice management, time management and knowledge sharing.
- Tax reference charts, rates, and tables - readily accessible to ease and speed processes.
- Tax policies and procedures - providing answers for all areas of your practice.
- Tax planning tools and strategies - to include value-added extended tax services with detailed work plans on a variety of topics.
- Tax planning ideas - provide proactive solutions to timely issues and topics.
- Tax manuals - guide you through topics that are not dealt with on a frequent basis.
- Tax templates - aid in explaining relevant issues, new laws and regulations to clients.
- Tax calculators - assist in decision making by applying laws and regulations to computations.

Intelligent Data Security provides the highest level of information security.

CPE Programs on audit methodology as well as a variety of other courses ranging from compliance to emerging issues in the industry.

Technology Support providing top-notch services such as high quality encryption to protect your firm and your clients' information.

