



# WAC:CPA

Walters Accountancy Corporation

**Onshore** Accounting & Consulting *Built into your business*



# You're flying blind without a financial engine

Leadership bandwidth tied up in  
admin / accounting functions  
rather than strategic expansion

Unaddressed  
efficiency and  
redundancy issues

Current staff performing  
functions outside of their  
core competencies

Communicating financial updates  
to investors is complicated and  
time consuming

Decentralized team

Inventory, Sales, Financial  
systems disconnected

# We're proud to deliver on high expectations



## Specializing in...

### On (Your) Schedule

Daily accounting  
Weekly Reporting  
Monthly Reconciliation  
Quarterly Review

### CFO Strategy

Performance analysis,  
income statement insights,  
workflow design and  
efficiency evaluation

### Unified Tech Stack

Connected systems and software  
implementation completed and  
managed by our experts

### CPA Oversight

All work done under WAC:CPA is  
reviewed and approved by our CPA  
before the month is closed, during  
the financial statement review

### Always Available

Our Account managers are a  
dedicated part of your team and  
always available for the phone.

### Financial Clarity

See your numbers in real time,  
understand exactly where your  
money's going, and make  
decisions with confidence.

### Supply Chain



### Contractor Services



### Entertainment



### Consumer Packaged Goods



### Property Management



**Our dedicated teams have earned decades of industry specific experience**

## **Meet Our Team Leaders**



**Kathryn Walters, CPA**  
President



**Ian J. Walters**  
Executive Vice President



**Peter Baron, MBA**  
CFO



**Sean Walters**  
Payroll, Tax Manager



**Ashley Hanu**  
Senior Accountant



**Camille Henkle**  
Staff Accountant



**Abegail Penuliar**  
Bookkeeper

# Our staff carry expert level experience with every platform we use

## Accounting Software



## Inventory



## Payroll



## Bill Pay



\*WAC:CPA does not own any of the above listed software platforms and does not claim to be an official partner of any software platform above.

# Our Pro clients are covered from all angles

**1**

**Daily**  
accounting activity

**2**

**Weekly Reports:**  
Cash flow  
Payables  
Receivables

**3**

Bill Payments  
Invoicing  
Payroll  
Sales Tax

**4**

**Monthly:**  
Profit and Loss  
Balance Sheet  
Cash flow

**5**

**Monthly:**  
Financial Statement  
Review

**6**

**Quarterly:**  
CFO strategy call  
Tax Planning  
Financial Review

**7**

**Dedicated,**  
local, expert team

**8**

**Transparent**  
and fair pricing

# Save hundreds of thousands reducing headcount

## In-house annual cost\*



\*Costs based on Glassdoor U.S. median estimates

## WAC:CPA



\*WAC:CPA Pro tier starting at \$7,500 / month  
Basic Tier support starting at \$2,500 monthly

# Our Service Packages

## Basic

Bookkeeper  
Starting from \$2,500 / month

Services Included:

Daily Bookkeeping  
Manage GL accounts  
Bank Reconciliations  
Support entering bills  
Sales Tax filing  
Some Payroll

Communication with: Owner

## Core

Senior Accountant  
Starting from \$5,000 / month

Services Included:

Everything in **Basic**  
Dedicated Account Manager  
Accounts Payable  
Accounts Receivable  
Weekly Status Reports  
Act as internal member

Communication with:  
customers and vendors  
Multi-platform support

## Pro

CFO  
Starting from \$7,500 / month

Services Included:

Everything in **Core**  
Multi-Platform Management  
Job Costing  
Custom Reporting  
Monthly Review Meeting  
Cashflow Statements  
Financial Insights  
Industry Analysis  
Compliance / reporting  
Control Improvement

Our service tiers give you a sense of the typical starting points for businesses at different stages.  
Every engagement is customized after an initial consult. All work done under WAC:CPA is reviewed by a seasoned CPA

# Why WAC:CPA?

Built to scale

Expert oversight

Custom services

30 years of success

Tech focused

Onshore staff

Full Service

Dedicated Team

Being a "good accountant" is synonymous with being trustworthy. Professional trust is earned over time; and from the origin of WAC:CPA, we have also earned experience. We are confident in promoting the fact that when stacked up against any accounting professional, small or mid-sized firm, we have a far deeper knowledge of the ins, outs, and needs of small to mid-sized businesses. We have guided companies in a variety of industries through challenging and complex situations and continue to be trusted by business owners as our firm and services grow.

Our services are designed to be built into your business. Big national firms will sell you on their size and quantity of high level accountants on staff. We have found rewarding success in designing bespoke solutions that fit naturally into our client's companies. We'll work with you one-on-one on your schedule; establishing daily, weekly and monthly cadences to deliver the information you need to run your business effectively. Engaging with our firm will feel like bringing on a small group of internal localized partners; experts at how your business works.

We are grateful to be able to work with a growing group of companies. A growing company is like a growing family. But at our core, our roots grow from the foundation of our CPA's legacy. **We operate and will always operate like a small, family owned business.** And we treat our clients like our friends and family - not just because so many of them are - but because we are truly passionate about the services we provide and we appreciate working with founders who put as much care into their business as we do.

# Development Process

WALTERS ACCOUNTANCY CORPORATION  
SINCE 1995

IAN J. WALTERS  
EXECUTIVE VICE PRESIDENT

1

## Discovery Call

An opportunity to get to know you and your business. We'll ask about the challenges you face, the scope of work you need completed, and what you feel may be missing in your company.

Book a  
discovery  
call!

2

## Proposal

We use a fee calculation software with transparent metric points to estimate the cost of service relative to the custom needs of your company. Our fee is a combination of the time required, transaction volume, and our level of expertise needed to complete the work.

3

## Onboarding

Our onboarding team will meet with you to learn about your existing workflows and to gain access to bank and credit card accounts, payroll, 401k and worker's comp, insurance, utility, or vendor platforms.

4

## Alignment

After a week of service we will organize notes and make sure that all outstanding items and problem areas are attended to and on schedule.

5

## Review

At the close of our first month we will meet with you to review your profit and loss and any other requested reporting. We will recommend process changes and review our scope of work to see if anything has changed and needs to be adjusted.



WAC:CPA

[We love our clients!](#)  
[Click HERE to see reviews and testimonials](#)



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## Ian J. Walters

Executive Vice President

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Scan above for my meeting link!