



C & R Consulting Group

Outsourcing Simplified | **Profitable Results**

Outsourcing Solutions to Accounting Firms



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CONTENT



C&R Background



Why C&R?



C&R Expertise



Services Offered



Security
Framework



Engagement
Models



Contact Us



C&R BACKGROUND



01 | Promoted by CPAs

02 | Group Headquartered in the US

03 | 50-year track record of professional standing

04 | Strong management team

05 | Proven offshore delivery expertise

06 | Well qualified delivery team

07 | ISO 27001:2022 certification by

08 | GDPR Compliant

WHY C&R?

01 Founded and Managed
by professional
accountants

02 Strong domain
knowledge

03 Adapt in technology
and software

04 Sustainability &
Scalability

05 Unique engagement
models

06 Customized Services

07 Customized customer-
specific SOPs

08 Extended Technology
& AI Services

09 Obsession to data
privacy

10 ISO 27001:2022
Certification

11 UK GDPR Compliant

12 Outstanding Customer
Testimonials

C&R EXPERTISE



EXPERIENCE

- Over 10000 tax returns processed
- Over 10 years of experience
- Worked on Individual and Corporate Tax returns
- Bookkeeping & Accounting for various clients from multiple industries
- Audit, Compilation and Review
- Data analysis for due diligence requirements & financial reports preparation



QUALITY & TIMELINES

- Creating SOPs to ensure quality
- Quick turn-around to maintain filing deadlines
- Two levels of review for most engagements
- Matching skills with client requirements
- Robust training process and evaluation



TECHNOLOGY

- Upgrading the knowledge of software & hardware
- Assisting the client in various technology models
- Upgrading the systems and applications in offshore
- Project management tools for improved efficiency
- Internalized the process of maintaining data security

MAJOR SERVICES



Tax Preparation Services



Accounting & Virtual CFO Services



Audit & Assurance Services



Customized Services



TAX PREPARATION SERVICES

Tax services represent a core revenue stream for the CPA firms—but they also come with challenges of seasonality, cost volatility, and capacity constraints. C&R has the experience and expertise to assist the CPA firms as a trusted partner.

At C&R we offer efficient and high-quality tax return preparation services. Our experienced professionals support firms in the critical near-filing stage while maintaining the highest industry standards.

- Comprehensive document organization
- Signer-ready tax returns
- Quick turnaround time and with accuracy
- Maintaining SOP compliance with periodic review

Types of Returns:

- Individual – 1040, 1040NR, 709
- Business – 1041, 1065, 1120, 1120S, 990
- International Tax Forms – FinCEN Form 114, 5471, 5472, 8865, 8858, 2555, 8621, 8938



TAX PREPARATION SERVICES

Tax Software Expertise:

- CCH Axcess, ProSystem Fx, UltraTax, Intuit Lacerte, Intuit ProSeries, GoSystem RS, TurboTax, Drake, TaxAct
- CCH Engagement, Workpaper CS

Major Complexities Handled:

Individual:

- Part year Returns
- Handling returns of multiple states
- Composite KIs & KIs with Alternate Investments
- Capital Gains – HUD, PTPs, Involuntary conversions
- Expat returns

Business :

- Recording AJEs & FTJEs
- 163 (j) interest calculations
- Consolidated Partnership Returns
- Preparation of K1/K2/K3 forms
- Sec 1231 capital gain computation



ACCOUNTING & VIRTUAL CFO SERVICES

Accounting & Advisory Services (CAAS) represent a modern and high-value approach in the field of Accounting profession. C&R focuses on providing services beyond bookkeeping and tax preparation whereby CPA firms can provide insight and guidance to their clients to make smarter business decisions.

C&R team ably assists the CPA firms to strengthen their CAAS division that helps them grow and thrive without compromising on the quality.

- Cost-effective support – Recruitment, Infrastructure & Management of resources.
- Expertise on demand – Trained accounting professionals.
- Scalable operations – Expand the capacity during peak seasons.

Type of Services:

- Core Services – Bookkeeping of transactions, AP, AR & Payroll processing, Monthly closing, and Basic financial statements reporting
- Compliance – Filing of Sales & Use Taxes, 1099 forms, assisting audit support, financial statement preparation and corporate tax filing
- Advisory – Budgeting, Forecasting, Cash Flow Analysis etc.
- Others – Cloud Accounting Setup, Automation tools, Strategic financial planning etc.

ACCOUNTING & VIRTUAL CFO SERVICES



Accounting Software Expertise

- QuickBooks Desktop
- QuickBooks Online
- Xero online
- Sage Intacct
- CCH Engagement
- FloQast
- MS Office Tools
- Other integrated accounting software applications

Major Complexities Handled

- Onboarding new clients – clean-up books, creating chart of accounts and establish processes
- Integrating new applications relating to payroll, inventory, services etc. into the accounting software
- Complete the YE reporting accurately when the reporting deadlines are close to the YE date
- Worked on customized reports like sales as per region or class, analysis of debtors etc.
- Creating templates for any new reports
- Efficient management of workflow with even deadlines for multiple clients

AUDIT & ASSURANCE SERVICES

The Audit and Assurance services go beyond compliance for the CPA firms, as they build trust, promote transparency, and offer strategic insights that help businesses to make informed decisions. C&R offers a strategic solution for the CPA firms facing tight deadlines, staffing shortages, or specialized audit needs.



C&R enables the CPA firms to focus on core priorities while maintaining the quality and integrity of the client's expectations.

- Cost Efficiency – Either project-based fees or a dedicated pool of resources
- Access to Skilled Professionals – Professionals trained in US GAAS, US GAAP and PCAOB standards
- Time Zone Advantage – Round-the-clock progress on audit engagements
- Scalable Expertise – Expand the capacity during surge or specialized requirements
- Core Priority of CPAs – Focus on complex judgement areas



AUDIT & ASSURANCE SERVICES



Type of Services

- Financial Statements Auditing
- Compilation and Review Engagements (SSARS)
- Preparation of Financial Statements
- Employee Benefit Plans Audit
- Internal Audits

AUDIT & ASSURANCE SERVICES

Major Complexities Handled

- Performed end-to-end audit procedures from planning to reporting and understanding of US GAAS and US GAAP requirements
- Updating the planning section and risk assessments to tailor the audit procedures
- Review of internal controls by narratives, walkthroughs and observation to determine the effectiveness
- Performed substantive audit procedures and documenting the required audit work papers
- Recorded detailed observations, including control deficiencies, key audit findings, and management recommendations
- Handled Employee Benefit Plan (EBP) Audits, ensuring compliance with ERISA and DOL requirements, and prepared related documentation.

Audit Software Expertise

- CCH Axcess Engagement
- CaseWare
- Workpaper CS
- PPC's Smart Practice Aids
- MS Office Tools
- Accounting Software – QuickBooks Online & Desktop, Sage Intacct & Xero

CUSTOMIZED SERVICES

CPA firms provide a range of advisory services beyond their core offerings such as Valuation and Transaction Advisory Services which involves in-depth financial analysis, due diligence, and strategic planning to support businesses through mergers, acquisitions, restructurings, and capital transactions. C&R adeptly supports the CPAs and offers a wide range of customized services to suit as per the requirement of the client relating to transaction analysis, transaction advisory, or tailored financial reporting.



C&R gives the CPA firms a competitive edge by having access to specialized expertise, scalable support with enhanced efficiency and objectivity.

- Scalability of resources based on requirement and complexity
- Access to experienced professionals as per the engagement requirements
- Improves the overall turn-around-time as the CPA can focus on analysis and decision making
- CPAs can concentrate on core business functions or other client engagements
- Enhanced objectivity as the team provides unbiased insights, improving the quality of recommendations

CUSTOMIZED SERVICES

Type of Services

- Data Book Preparation Services – Comprehensive financial statement analysis of financial statements and tailored due diligence reports
- Transactional Analysis – Targeted financial statement analysis to support litigation, financial modeling, insurance claims, and other specialized needs.
- Transaction Reporting – Detailed financial tracking and reporting aligned with key operational units—cost centers or profit centers—for enhanced visibility across sectors
- Word Processing Services – Drafting comprehensive reports and business documents like financial statements, engagement letters, valuation reports, HR Manual and many more as per the firm-wide protocol
- Marketing Support Services – Systematic updates of CRM contact data, lead validation from marketing platforms, and data cleansing to ensure accurate and actionable business development insights.

Major Complexities Handled

- Conducted detailed due diligence for M&A transactions spanning various industries, including financial analysis and operational assessment, with consistent on-time report submissions.
- Analyzed manufacturing costs from various cost centers on a daily basis, ensuring accurate tracking of expenditures and timely submission of reports for management review
- Prepared financial statements and reports in full compliance with US GAAP, consistently maintaining 100% accuracy while managing a high volume of reports during critical submission deadlines

SECURITY FRAMEWORK



C&R Security Objectives



C&R Security Strategies



C&R Security Methodologies



C&R Security Compliance

SECURITY FRAMEWORK

C&R Security Objectives

- Maintaining Client Data Confidentiality, Integrity and Availability
- Prevent/deter and eliminate misuse and frauds
- Adhering to Service Level Agreements

C&R Security Strategies

- Establish robust Process and procedures
- Effective surveillance and monitoring
- Obtain validation from credible independent agencies

C&R Security Compliance

- ISO 27001:2022 certification by TÜV Rheinland
- GDPR Compliant

C&R Security Methodologies

Access Control

- Secure access to the premises through bio-metric access
- Secure access to work area through bio-metric access
- No access to data and client's computers from outside the secure room
- All round Surveillance through CCTV
- Restricted access to computers and data
- Restricted use of emails and internet
- Secure access to data
- No permission to carry any external media into the secure work area

Technology Practices

- Robust servers with state of the art back up, antivirus, update procedures
- Robust Firewall to prevent external access and hacking
- Periodical vulnerability tests to test Firewall efficacy
- Regular back-up to prevent data loss
- Encryption of data
- Clear desk policies
- Disabling all external drives / media to prevent copying, printing and transferring the data

Management Practices

- NO Work from Home
- Detailed processes and procedures with the help of industry experts
- ISO 27001:2013 by TÜV Rheinland
- Regular training to staff on security procedures
- Regular monitoring of compliances
- Effective screening of employees during recruitment
- Experienced and skilled IT maintenance
- Signed contracts and NDAs with employees and users as a strong deterrent

ENGAGEMENT MODEL

Task Delivery Model (TDM)

- Pricing is based on the task that has been assigned
- Pricing per task (tax returns)
- Pricing on hourly basis (bookkeeping)
- Pricing is dependent on volume
- Invoiced based on hours estimated or mutually agreed

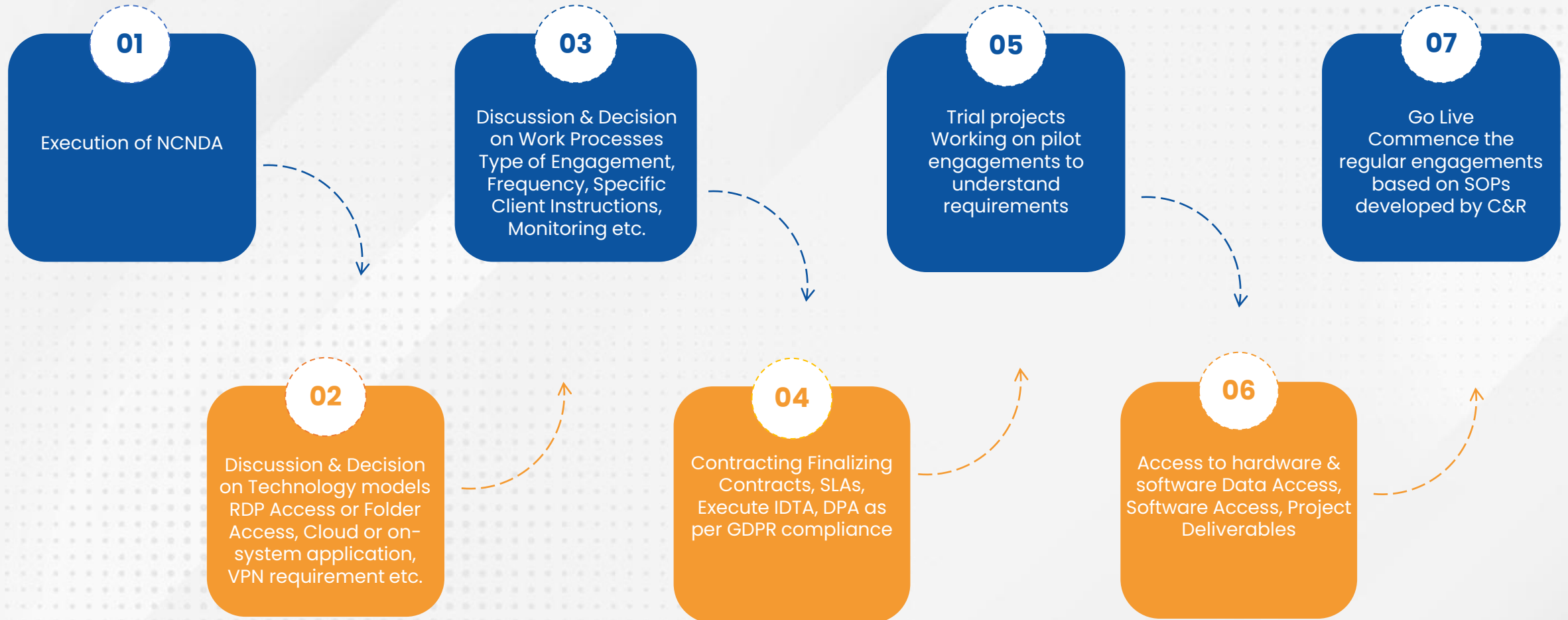
Dedicated Resource Model (DRM)

- Dedicated resources allocated to every client
- Team will be available to on multiple engagements
- Minimum of 5 resources to ensure consistent quality
- Pricing on monthly basis for the resources allocated
- Preferable for specialized engagements like audit, reviews, valuation services etc.

Joint Venture (JV)

- Establish a JV along with the CPA firm
- Entire facility and resources are managed by JV
- Highly efficient
- Highly scalable
- Amenable for BOT model

ENGAGEMENT PROCESS





THANK YOU



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