CLIENT ADVISORY SERVICES

> *"The Olsen Thielen team was able to walk me through everything that was needed and completely transformed the way we handle our accounting processes at McCollum Crowley."*
>
> Cassie Kirscht, Firm Administrator
> McCollum Crowley Law Firm

We Understand You

Whether you need to outsource your entire finance and accounting function, expand your team, or transform your current approach, Olsen Thielen can help. With our Client Advisory Services (CAS) team, you'll get immediate access to a wider range of expertise — from CFO-level strategy to day-to-day bookkeeping.

As a business owner, it is critical to have strong financial and accounting systems in place so you can focus on growing your business and less on your back office. We work closely with you to ensure your accounting, payroll, and reporting needs are handled.

Accounting

- Bookkeeping services, including the recording of income, expenses, and monthly adjustments
- Payroll services
- Basic reporting, including monthly profit/loss statements and balance sheets

CFO Services

- Risk assessment and review of internal controls
- Corporate strategy
- Board support including reports, attendance, and presentations
- Business succession planning, including buy-ins and buy-outs

Controller Services

- Budgeting and forecasting
- General ledger posting review and categorization discussion
- Key Performance Indicators (KPI) assessment
- Advanced reporting including cash flow planning and analysis

Reach Out Any Time

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