



CLIENT ACCOUNTING & ADVISORY SERVICES (CAAS):

CONTROLLERSHIP & INTERIM ADVISORY

To achieve success and growth, effective financial leadership is crucial for any organization. Whitley Penn's Controllership & Interim Advisory Services can provide the skills of a fractional Controller, overseeing the closing process and excelling in financial analysis, budgeting, and forecasting.

SERVICES OFFERED

Our team is equipped to provide support for a range of advisory projects, including:

- » Audit preparation and support
- » IPO readiness
- » Securities Exchange Commission (SEC) reporting
- » Generally accepted accounting principles (GAAP)/International Financial Reporting Standards (IFRS) consulting
- » Technical accounting guidance
- » Management and board reporting
- » Controller/CFO support
- » Staff augmentation

ADDED VALUE

Our all-in-one solutions simplify the management of your accounting and technology needs, while our team of advisors are available to guide you through any obstacles that may arise. Through our budget-friendly services, you can rest assured that your finances are in good hands. As your business grows, our flexible solutions will grow with you, freeing you up to focus on running your business while we handle the accounting details.

THE WHITLEY PENN DIFFERENCE

Whitley Penn is the 37th largest firm in the nation based on 2023 rankings in *Accounting Today*, 37th in the nation based on the 2022 rankings in *INSIDE Public Accounting's* "Top 100 Firms", and one of the fastest growing firms in the nation. We have an extensive team of experienced audit, tax, consulting, and valuation professionals that we will be able to draw upon as needed.

We are service oriented, and we will exceed your expectations. We believe in and understand the difference between deadlines versus guidelines and will do everything possible within our process constraints to meet and exceed your expectations.




CONTACT US

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