

OUTSOURCED ACCOUNTING SERVICES

H2R

CONTROLLER SUPPORT FOR YOUR BUSINESS
AT A FRACTION OF THE COST

WHO WE SERVE | GROWTH-ORIENTED BUSINESS OWNERS

H2R CPA's Outsourced Accounting Services are a suite of solutions designed to help proactive, growth-oriented business owners understand the financial health of their business, make informed business decisions, and streamline accounting and compliance processes.

BENEFITS

FOCUSED ON YOUR SPECIFIC NEEDS & GOALS

- Understanding the status of your business throughout the year for financial decisions and/or banking needs
- Controller-level leadership to complement your accounting team
- Peace-of-mind knowing you are making decisions based on quality data
- Implementing proactive tax minimization strategies for your business and individual tax filing(s)
- Optimizing the full suite of QuickBooks® products, which is often underutilized
- Linking third-party software, bank accounts, and credit cards to optimize QuickBooks®
- Tracking financial metrics critical to the success of the business
- Use detailed financial analysis to drive proactive business decisions in support of owner-identified goals

REQUIREMENTS

FOR BUSINESS OWNERS

- Completion of an initial assessment for understanding the business and tailoring deliverables
- Use of QuickBooks® accounting software
- In-house financial contact
- Cooperative QuickBooks® data entry solution

COST COMPARISON

IN-HOUSE VS. OUTSOURCED

The average 2026 full-time salary for a qualified and experienced controller-level accountant in the western Pennsylvania region is over \$120,000 per year.

– Source: roberthalf.com

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INITIAL ACCOUNTING ASSESSMENT

- 1** H2R provides the initial assessment questionnaire to the company for completion. Completing these documents typically takes about one hour.
- 2** H2R reviews the questionnaire prepared by the company to develop an outline of follow-up questions to better understand the company's strengths and weaknesses (2 to 3 days).
- 3** H2R schedules and meets for 90 minutes with key stakeholders to understand and confirm the strengths and weaknesses identified. This includes finalizing the assessment and discussing recommendations specific to the needs of your business.

SERVICE LEVELS

STANDARD

Training and financial education of company staff and management (QuickBooks®, bill pay management, invoice matching, standard journal entries, etc.)

Weekly virtual meetings between your point of contact and an H2R professional

Document financial processes and procedures for future reference

Monthly bank reconciliation assistance

Financial statements setup on accrual basis

Monthly virtual meetings between the owner/head of finance with an H2R professional to review P&L, Balance Sheet and Cash Flow

Tax planning minimization meeting in the last quarter

Prepare annual tax filing

Available for simple questions throughout the year (questions that require research will be billed at our hourly rate)

Monthly fee

ADVANCED

Everything in STANDARD plus:

Ensures monthly close by the 15th of the month

Develop and streamline financial processes to drive operational and financial efficiencies

Perform detailed analysis for critical accounts/KPIs, such as accounts receivable and accounts payable

Financial statements adhered to GAAP, such as revenue recognition and leasing standards

Integration of third-party software and other accounting technology to QuickBooks®

Access to and support in connecting with our business network to help realize your growth goals

Monthly fee

PRO

Everything in ADVANCED plus:

Design of management dashboard

Support during annual budgeting process

Proforma cash flow modeling for management decision making, such as "make vs. buy" decisions, new product analysis, and potential acquisitions

Provide reporting package to sources of capital (investors, banks, insurance, etc.)

Review of cash management cycle including review of vendors and customer payment terms

Monthly fee