



GOLDILOCKS, INC. AND THE THREE CPA FIRMS

ONCE UPON A TIME...

Goldilocks, Inc. was in desperate need of a CPA firm that met their accounting and auditing needs. In addition, they needed a firm that offered tax services and helped with issues that were beyond the numbers.

So, they set about finding which CPA Firm was best for them:



“TOO SMALL”

- Single Operator
- Tax Returns Only
- Less than adequate staffing
- Often dependent on one large client
- Limited specialized knowledge/expertise
- Lagging in Technology
- Better with single-operator clients

- Large Clients; no time for the “little guys”
- High Billable Rates; little added value
- Partners not accessible for average sized client
- Partners as Managers
- Staffers do the work
- “Little Fish in a big pond” Culture
- State-of-the-art Technology
- Prefer big business as clientele

“TOO LARGE”



“JUST RIGHT”



- Accessible Partners working on Accounts
- Sized appropriately to offer specialty expertise
- Fair billing rates
- Value-added services
- Team approach for deeper service delivery
- Current technology with appropriate IT recommendations for clients
- Customized services for a variety of client sizes