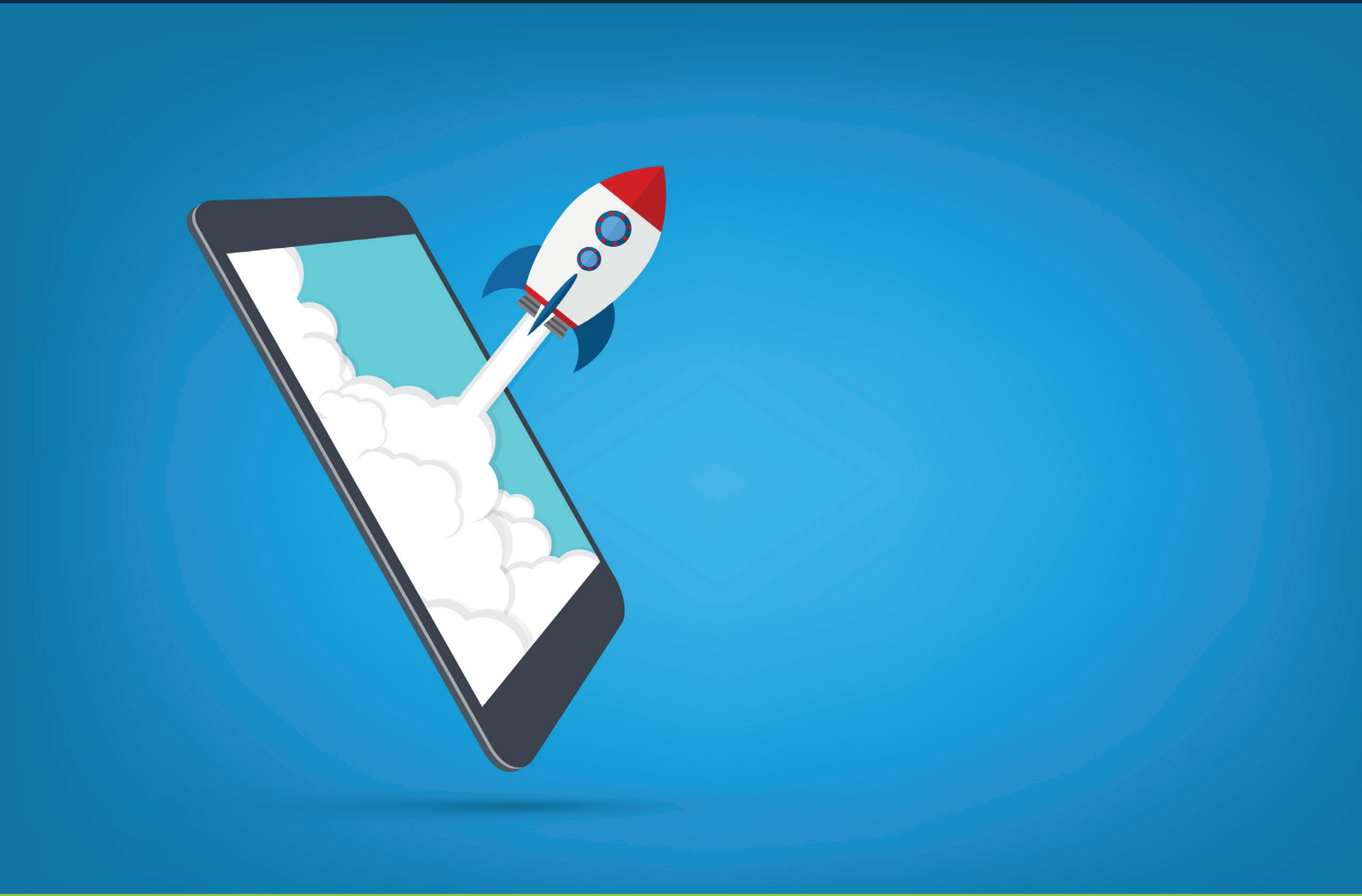
Dopkins & Company, LLP
CERTIFIED PUBLIC ACCOUNTANTS AND CONSULTANTS

CLIENT ACCOUNTING & ADVISORY SOLUTION (CAAS)

A Resource for Business Optimization



Accounting solutions to keep your business moving forward.

200 International Drive • Buffalo, NY 14221 • 716.634.8800 • FAX 716.634.8987 www.dopkins.com

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CLIENT ACCOUNTING & ADVISORY SOLUTION (CAAS)

Dopkins Client Accounting & Advisory Solution (CAAS) is centered on helping our clients transform the accounting and finance function and other processes of their businesses to more effectively confront challenges and seize opportunities. Our CAAS team can drive business results and create value in four critical areas:

01 TALENT ACQUISITION & RETENTION

02 RESOURCE UTILIZATION

03 ORGANIZATIONAL RISK

04 HIGH-LEVEL BUSINESS ADVICE/COUNSEL

Dopkins CAAS

SOLUTIONS FOR CHALLENGES & OPPORTUNITIES

WHO NEEDS THIS SERVICE?

Examples include:

- MEDICAL PRACTICES
- NOT-FOR-PROFIT ORGANIZATIONS
- FAMILY-OWNED BUSINESSES
- FAMILY OFFICE (HIGH NET WORTH INDIVIDUALS/FAMILIES)
- REAL ESTATE MANAGEMENT COMPANIES
- LARGE PUBLIC/PRIVATE COMPANIES

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CLIENT ACCOUNTING & ADVISORY SOLUTION (CAAS)

OUR CAAS SERVICE OFFERINGS

We can provide tailor-made solutions based on the scope of services your business needs, including:

- Full-scope virtual accounting department
- CFO-level services
- Controller-level services
- Accounting staff-level services
- Business process outsourcing
- Continuous improvement services

BENEFITS TO BUSINESS OWNERS

- **The Right People:** We serve you with a team that brings experience and expertise in all areas of the finance function focused on adding value to your business
- **Real-Time Visibility:** We provide dynamic dashboards and reports that give you a clear picture of your financial standing
- **Connected Data:** No more disparate data. We provide a best-in-class cloud platform that can integrate with other platforms
- **Scalable Process and Controls:** We implement proven processes and controls that accommodate growth, improve efficiency and reduce risk

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YOUR CAAS TEAM

FOR MORE INFORMATION ABOUT DOPKINS CLIENT ACCOUNTING & ADVISORY SOLUTION SERVICES, CONTACT:

Albert A. Nigro CPA, CVA

Partner, Tax Advisory Group ▪ anigro@dopkins.com
As the leader of Dopkins CAAS team, Al focuses on developing solutions for clients to help them improve their finance and accounting functions through re-engineered processes, digital transformation and optimal utilization of talent.

Nicholas Fiume CPA

Partner, Assurance Services Group ▪ nfiume@dopkins.com
Nick is the Leader of Dopkins Healthcare and Not-for-Profit Practices. He provides assurance and consulting services to health care providers, hospitals, health and life insurance, as well as tax exempt organizations, manufacturing and financial services.

Matthew R. Huefner

Director, Dopkins System Consultants ▪ mhuefner@dopkins.com
Matt is responsible for providing implementation and support services to Enterprise Resource Planning (ERP) and accounting system user clients.

Veronica L. Koller

Supervisor, Assurance Services Group ▪ vkoller@dopkins.com
Veronica provides compliance and consulting services to not-for-profit agencies and governmental entities. Her Principal areas of expertise include Sarbanes-Oxley consulting review and bookkeeping services and year-end funding analysis for local schools.

Chad R. O'Connell AIF®

Senior Wealth Advisor, Dopkins Wealth Management, LLC ▪ coconnell@dopkins.com
Chad manages the firm's retirement plan services group, which focuses on investment management, consulting and fiduciary governance services to corporations and not-for-profit entities. In addition, Chad also provides financial services to high net worth individuals and business owners.

Dopkins Wealth Management, LLC is a registered investment advisor owned by the partners of Dopkins & Company, LLP.

Mark B. Stamer CPA

Senior Manager, Assurance Services Group ▪ mstamer@dopkins.com
Mark primarily focuses on consulting engagements assisting clients by performing risk assessments, evaluating and improving internal controls, developing fraud prevention programs and facilitating change management and process improvement.

Ryan J. Winkler CPA

Manager, Tax Advisory Group ▪ rwinkler@dopkins.com
Ryan provides tax compliance services for both businesses and individuals, where he manages and oversees review and compilation engagements and tax compliance engagements. Ryan also works directly with clients to provide business and individual tax planning as well as consulting on various business matters. Ryan also serves our clients in a co-source capacity, providing predominantly controller-level duties.