

Selecting a CPA Firm to Help Your School Grow

As a school leader, choosing the right CPA firm plays an essential role in your ability to run successful business operations that support your school's mission. It is important that your provider has meaningful education industry experience and an approach that emphasizes:

- Partnership and accessibility throughout the year
- Respect for the business staff's resources and time
- Understanding of the strategic importance of the audit

Consider Mary, CFO and business manager of an independent school in Atlanta, Georgia. Like most school CFOs, she doesn't come from an education background. With her deep experience in finance, Mary values her relationship with Aprio because it has enabled her to build upon her expertise in financial controls and compliance and become a strategic ally to the school's administrators and board members.

The importance of partnership

"We feel we have established a partnership I can count on," Mary explains. "I use Aprio as a sounding board throughout the year. When I have a question, all I have to do is pick up the phone and they are always available."

At Aprio, we believe that staying tightly integrated with schools provides a broader view of the challenges and enables us to help prevent risks and discrepancies that can negatively impact the organization and the families you seek to serve.

Reflecting on the recently completed audit experience, Mary made an unusual comment: "Our Aprio team has made the audit process relaxing." That's not something you hear very often!

The importance of respect

Remaining engaged also allows our accounting team to develop a better understanding of the specific issues your school faces so we can provide practical advice that enables the achievement of your mission and alleviates stress.

"Aprio provided clear guidance regarding the appropriate staffing of our business office to allow for segregation of duties. The suggestions took into consideration the staffing limitations of our small school while still providing the appropriate controls to protect us against fraud," Mary said. Mary's ability to take input and implement effective policies and procedures creates new opportunities for growth and makes her a valuable asset as a consultative business officer.

The strategic importance of the audit

Mary noted that, "Aprio's deep understanding of the importance of the audit report as a strategic tool for the school has been invaluable. Their reports are always well



There is significantly more information about your school's operations and management that board members can obtain from the audit and related financial statements if you know the right places to look and the right questions to ask.



Passionate for what's nextSM

footnoted to provide useful context. And they are always available when questions arise." Mary deciphers the trends and results woven into the financial statements in order to identify both the school's needs and opportunities.

"Discussing these issues with Aprio has made it easier for me to present findings and make recommendations to the board, and that enables us all to make informed decisions that can advance our goals."

How Aprio can help your school

As a full service accounting firm, Aprio is committed to educational excellence, and our commitment to schools extends well beyond providing tax and audit services. We partner with you to provide the services, information, training and advice that support better decision-making and greater leadership. We help you rise above the role of financial gatekeeper to become a critical asset in your growing school.

About Aprio

Since 1952, clients throughout the U.S. and across more than 40 countries have trusted Aprio for guidance on how to achieve what's next. As a premier, CPA-led professional services firm, Aprio delivers advisory, assurance, tax and private client services to build value, drive growth, manage risk and protect wealth. With proven expertise and genuine care, Aprio serves individuals and businesses, from promising startups to market leaders alike.

Aprio.com



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