



## Accounting firm credits client communication tools from RCReports for onboarding program success

### Customer Profile

Richard Pasquantonio CPA/CFF, CFE, CFDA is a forensic accountant for Adam Shay CPA, PLLC. He assists taxpayers and litigants to resolve disputes with the government, business partners, employees, family members, and other parties.

More information about Richard and Adam Shay CPA, PLLC can be found at <http://www.adamshaycpa.com>.

### Background

We all know how challenging it can be onboarding new clients. From gathering financials to conducting salary evaluations, clients seem to think their work stopped once they hired a tax preparer. That's precisely what was happening to Adam Shay CPA, PLLC, a North Carolina-based tax preparation firm who primarily deal with small, closely held businesses.

Richard Pasquantonio of Adam Shay CPA, PLLC frequently onboards new clients. As a specialist in forensic accounting, he knows the necessity of having all the pieces of the puzzle before beginning his work. Helping a client successfully resolve a dispute requires frequent and clear communication, which some clients were resisting

## Challenges

Adam Shay CPA, PLLC had implemented a three-year onboarding program, which included all clients participating in a salary evaluation. For the first year, the client is educated about the value of an accurate reasonable compensation figure, and in the second year they recommend calculating such a figure. By the third year, they require clients to have a reasonable compensation figure determined. However, some clients weren't responding to the firm's inquiries about the data needed to calculate their reasonable compensation.

## Solutions

Thankfully for Mr. Pasquantonio his firm has access to RCReports.com. By utilizing many of the tools from the Resource Library, such as the digital client interview, he was able to convince the last holdouts from their onboarding program to provide their data. Mr. Pasquantonio tells us that his clients appreciated the "professional work product... and clear unambiguous expectations."

## Outcome

All the clients successfully completed the onboarding process, even those who hadn't been particularly proactive. Adam Shay CPA, PLLC doesn't require their clients to utilize RCReports for their reasonable compensation, they do require whatever solution is used to be of equal quality. However, after using the tools from the Resource Library, all the clients opted for RCReports. Mr. Pasquantonio credits the easy-to-follow prompts and professional reports produced by RCReports.

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## About RCReports Reasonable Compensation Solutions

RCReports provides instant and accurate insights into Reasonable Compensation for closely held businesses to ensure your clients remain compliant, minimize risk and realize maximum payroll tax savings. With in-built industry, legal, IRS criteria and salary data intelligence, tax advisors, valuers and forensic accountants gain access to credible and independent Reasonable Compensation calculations with guaranteed cover in the event of an IRS audit or litigation. Access reports for planning, compliance or normalization within minutes through an intuitive, cloud-based platform, removing all guesswork and providing full documentation and transparency around your clients' compensation