



SANFORD ROSE ASSOCIATES®
EXECUTIVE SEARCH

SRA VALUE PROPOSITION

ACCOUNTING & OPERATIONS

The SRAI Finance and Operations team will help guide and support you with the time-consuming parts of running a business that keep you out of your market and generating revenue for the firm.

From setting up your QuickBooks, establishing a chart of accounts specific to your business and the search industry, and helping you use the accounting software, we will help be your safety net to keep things running smoothly in an effort to minimize your time away from your practice or leadership role and growing the business.

Our team can help you create an effective business plan and provide insights on benchmarking your ratios and progress against other organizations in the network.

We can also aid in your facilitation of a standardized on-boarding process for all of your new hires as well as executing all of your standard HR onboarding documents, forms and contracts.

On a quarterly or semi-annual basis, we can review your commission calculations and payrolls paid to help avoid any possible over payments due to formula errors or simple math mistakes.

The SRAI Finance Team can review your tax obligations and informally audit your year-end tax filings, all as a second set of eyes - always looking for additional savings, ideas for future improvements, and of course, "red flags." Our team helps you systematize the management of your Accounts Receivables, Payables, and statistical tracking.

Following each full calendar year, the SRAI Team can offer basic financial analysis and overview of your business. This provides a "year in review" solution in which we will always offer ideas for benefits and business services as the timing is right, all to help you build a stronger business solution.

When you need to evaluate your compensation and perhaps one day equity plan, we can help you design and implement ones best for the needs of your firm.

Simply put, your organization requires systems that will adapt to the changing needs of your firm, and we have a proven history of creating and managing those constantly evolving systems.