

VIRTUAL BACK OFFICE/ACCOUNTING SERVICES

A unique service that Whitley Penn offers as part of many professional services engagement is access to our “Virtual Back Office” (VBO) team that handles the details of accounting, bookkeeping, payroll and tax records. Staffed by skilled and experienced professionals who are chosen for both their financial skills and client relationship development abilities, our VBO group is a cost-effective alternative to hiring and training your own in-house team. Our comprehensive approach creates both short-term and long-term accounting, bookkeeping, payroll and tax records solutions that are ultimately a greater value than any other in-house or outsourced financial function.



Just-in-Time Back Office Services

We are available to assist at the start of any accounting, audit or tax engagement, working in collaboration with the Whitley Penn partner who manages the account. We are available to handle the details for any or all the administrative functions:

- Establishment of tax identification numbers
- Selection and implementation of financial software
- Purchase orders and vendor identification systems
- General accounting, bookkeeping and payroll
- Tax records
- Budget planning
- Expense reports
- Cash reconciliation
- Budget planning and production scheduling
- Inventory and sales forecasts
- Manage accounts receivable
- Process accounts payable

For More Information, Contact:

Trina Dicketts – 817.259.9170; Trina.Dicketts@whitleypenn.com

Whitley Penn has consistently been named among the top 25 firms in the country by *INSIDE Public Accounting*. We believe our success has been accomplished by focusing on the quality of our services and developing a quality team of professionals. Our culture of growth has allowed us to minimize professional staff turnover, which allows us to fulfill our commitment to staff continuity to our clients.



24/7 Back Office Availability

Everything we do is a turnkey solution so that our client can concentrate on running the business while leaving the records functions to us. And because we know the company and are an integrated part of Whitley Penn services, your Virtual Back Office professional can often answer – by phone or email – any basic questions about a particular record-keeping or procedural matters.

Staffing Flexibility

Our professionals take ownership of both the client relationship and the back office tasks. We work with the company in the way that the client prefers: on location two or three days a week or virtual services available online as needed. Thanks to our team approach, our clients will become familiar with several professionals who work regularly with the accounts and learn the details of the business.

Next Steps

Whitley Penn has efficient virtual back office solutions for companies of any size with financial or accounting staff needs. We can help from A to Z and define our success as alleviating headaches related to paperwork, personnel, deadlines, administration and organization – and ultimately helping you attain your goal of running a successful business.