



## CLIENT ACCOUNTING & ADVISORY SERVICES (CAAS): **TECHNOLOGY SOLUTIONS**

### UPGRADE YOUR ACCOUNTING & FINANCE TECHNOLOGY

At Whitley Penn, our Client Accounting & Advisory Services team assists clients with their digital transformation journey with best in class technology and a client focused service model. The result is greater financial and operational visibility with deeper insights, enabling a stronger decision making framework.

#### BENEFITS OF LEVERAGING TECHNOLOGY SOLUTIONS

- » Industry Leading Knowledge
- » End to End Solutions
- » Solutions Focused
- » Scalable Solutions
- » Cost Effective
- » Partnership Support Model

#### TECHNOLOGY SOLUTIONS DRIVERS

- » System Design
- » ERP Implementation
- » Sub-system Implementation
- » System Integrations
- » Managed System Services

#### KEY INDUSTRIES OF FOCUS



FAMILY OFFICES



HEALTHCARE



INVESTMENT FUNDS/  
REAL ESTATE



NONPROFIT

## HOW WE DELIVER

### System Design

Overarching system design focused on bringing information in and delivering powerful output.

### Implementation

We guide you through a best in class process and proven methodology designed to deliver on-time and on-specification.

### Integrations

We advise our clients on the integration process and either implement native integrations or work with partners to deliver custom integrations.

### Managed System Services

To meet the demands of the quickly evolving and complex world, we partner with clients through our managed systems service offering. This service includes training, enhanced reporting, quarterly business reviews, software release management - all to ensure systems continue to meet client needs as they change.

## TECHNOLOGY WE SUPPORT

