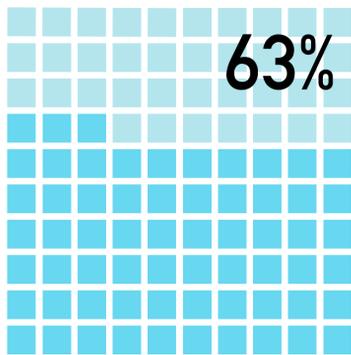


Meeting Client Needs with Broader Service Offerings

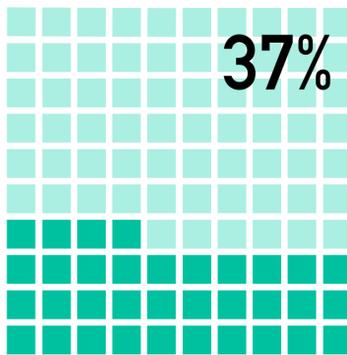
As a trusted advisor, accountants are well-positioned to connect their clients to valuable services.



FIRMS ARE STRATEGIZING FOR NEAR-TERM GROWTH



Expand client base

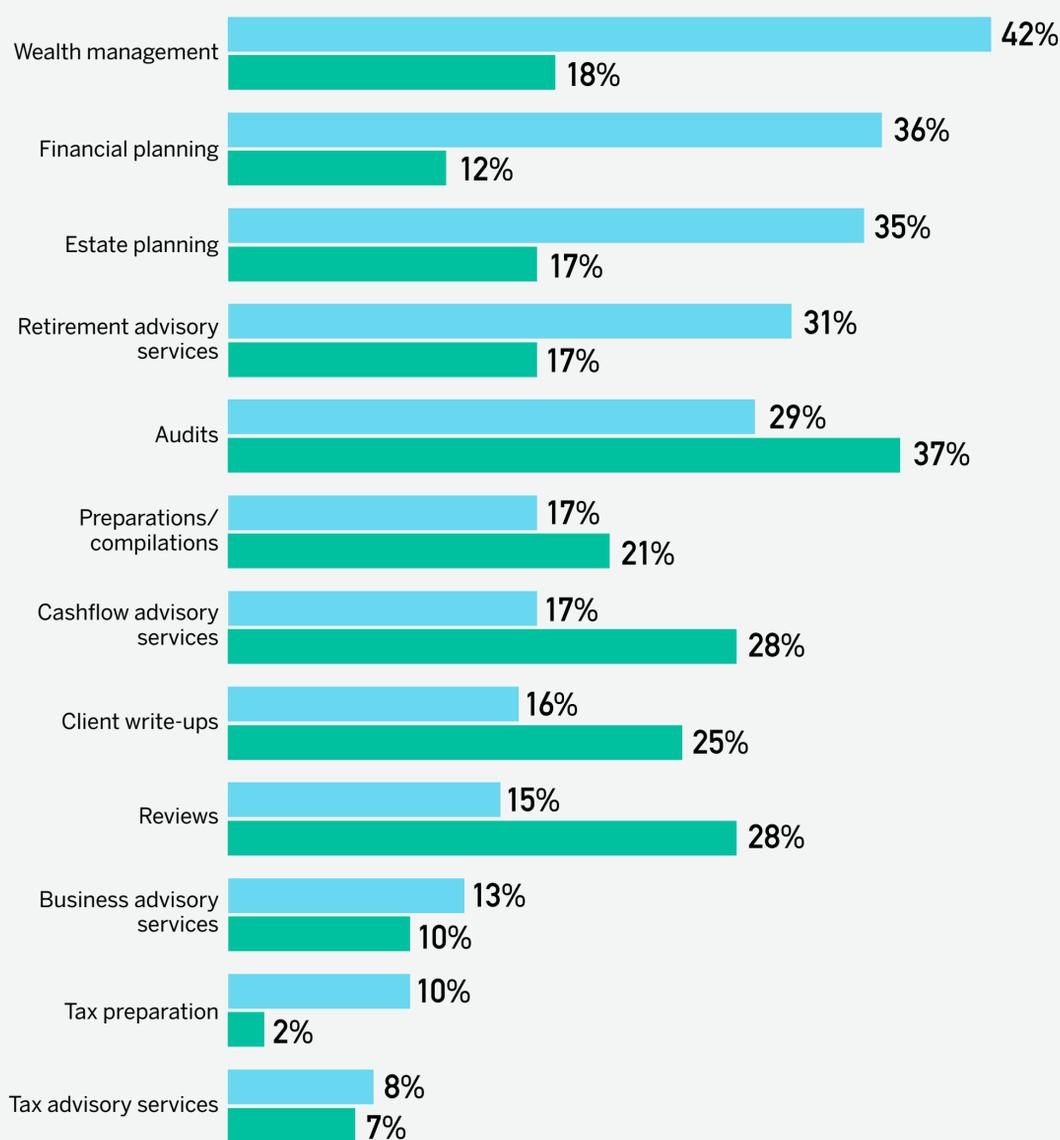


Cross-selling to current clients

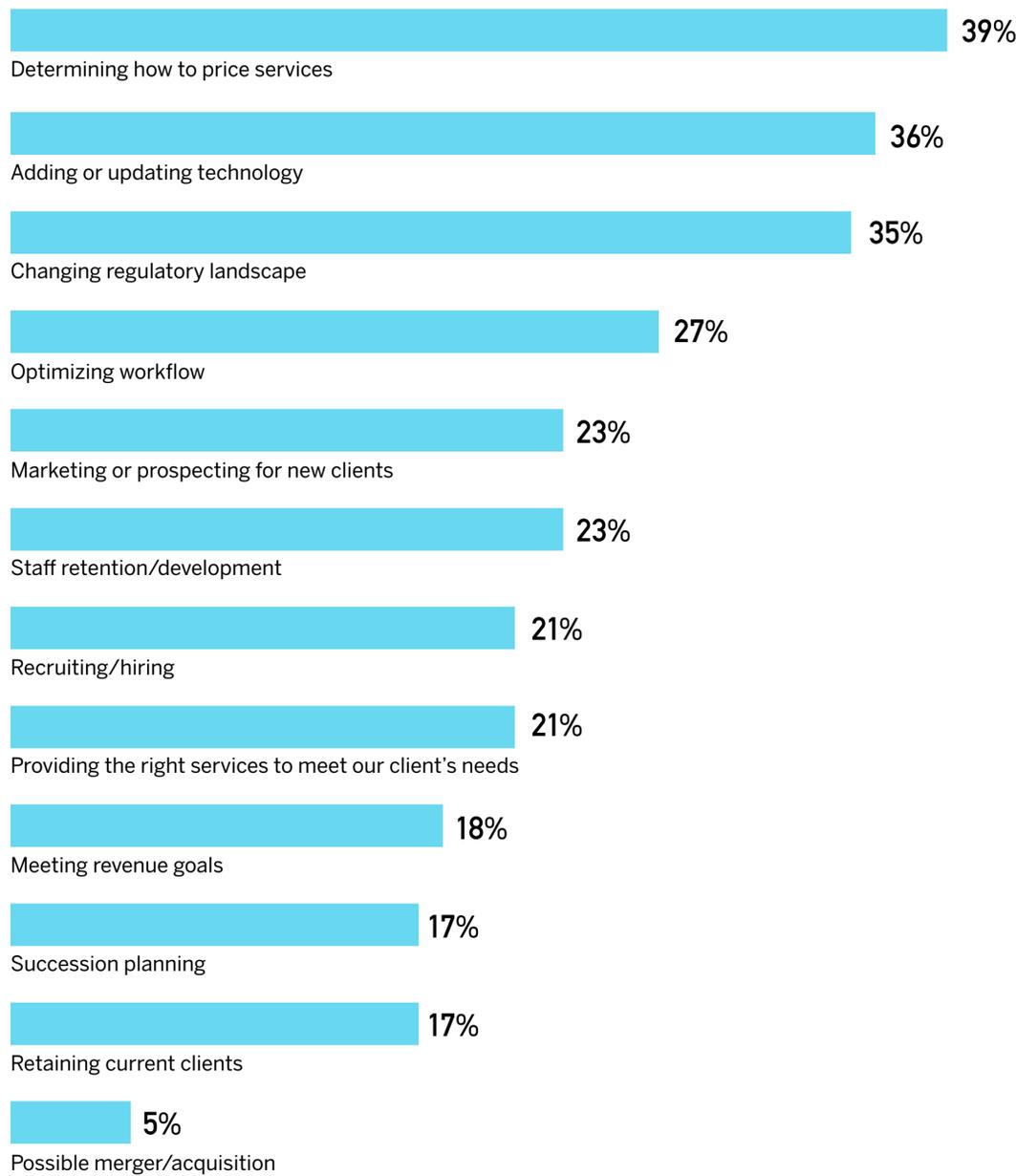
BUT MANY LACK THE ABILITY TO OFFER SERVICES DIRECTLY

My firm doesn't offer, but we have referral relationships

My firm does not offer and we don't have referral relationships



AND THEY FACE CHALLENGES RELATED TO EXPANDING THEIR SERVICES



EXPANDING SERVICES THROUGH PARTNERSHIP NETWORKS CAN BE A WIN-WIN PROPOSITION

Benefits from partnering to offer a wider array of advisory services include:



Improved client service



Improved brand awareness



Help attracting new clients



Help retaining clients



Increased revenue

For more information on this topic please visit

choreoadvisors.com

Methodology

This research was conducted by Arizent and Accounting Today and paid for by Choreo, LLC. The primary objective of the research is to better understand how advisory services fit within the practicing offices of accountants. Research was conducted online during December 2023 among 115 qualified serving leaders. To qualify, respondents must work at a tax or accounting firm in at least a director-level role. This was a blind data collection effort. Choreo was not identified as a sponsor of the research to those surveyed. Not all survey data is shown and the highlighted results and information were prepared by Accounting Today specifically for use by Choreo. Choreo does not offer all services listed above.

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