CPA.com and Paychex
Partner Program

CPA.com/Paychex | 877.264.2615

Exceed expectations

Be your clients' most trusted business advisor

Are you your clients' go-to person for advice on business growth and compliance? That's a tall order and we can help. Increase your bandwidth and expand your higher value services with the Paychex Partner Program. CPA.com and Paychex, industry leaders in innovation, provide you access to expertise, resources, and solutions in areas like HR, payroll, tax guidance, and 401(k) planning. Move your firm into the digital arena and focus on growing your business with the smartest solutions in the industry. **Paychex® Partner Pro** gives you real-time access to mutual clients' payroll and HR data through a centralized dashboard.

Why it matters

You can proactively deliver insights and build a stronger advisory relationship with your clients:

- Spot gaps in client information to see what needs attention
- Create client data reports with customizable insights
- Access Paychex Flex® and process payroll and HR tasks from the dashboard
- Get quick answers through live chat support
- Explore integrations via the Paychex Marketplace to connect & share data across systems

Simplify the grind. Elevate your role.

With your referral, your clients receive:

- **One month of free payroll, HR and retirement services**
- **Six-month, money-back satisfaction guarantee on payroll and retirement services***

*Restrictions may apply

Preferred partner solution of

CPA.com

PAYCHEX®

Advise Smarter: Resources and Tools to Elevate Your CAS

Are your clients turning to you for business guidance beyond accounting? Enhance your client advisory services (CAS) with help and resources from Paychex.

Paychex HR Services
Want to launch your CAS practice, but unsure where to start? Adding HR analytics and reporting from Paychex to your tech stack can help you deliver niche HR and workforce guidance to your clients, including:

- Quick answers using predictive analytics and a conversational AI tool
- Guided analysis on people challenges, from talent acquisition to retention, to help clients make more informed decisions
- Analytics and customizable reports available 24/7 across payroll, HR, benefits, and accounting
- Benchmark the competition and adjust strategy using robust datasets for metrics like pay and turnover rates

Accountant Knowledge Center (AKC)
Powered by CCH Answer Connect from Wolters Kluwer, this powerful online platform is filled with accountant resources and tools (valued at $14,000) and available to you at no cost.

Using natural language AI search tools, you can quickly search for current and historical information, related taxes, compliance, and CPE trainings. Includes free access to online U.S. Master Tax Guide with AI.

Compliance expertise and resources
Support your clients and enhance your client advisory services by taking advantage of the expertise offered by more than 200 compliance analysts from Paychex. They monitor changes to regulations, laws, and taxes at the federal, state, and local levels and provide resources to help you and your clients stay informed.

Accountant-Exclusive Programs
For over two decades, we've partnered with the AICPA to help accountants and their clients with solutions in HR, payroll, and 401(k) planning.

CPE Webinars
Earn credits and enhance your status as a subject matter expert at your firm. Paychex and CPA.com offer complimentary webinars throughout the year on HR compliance, regulatory issues and retirement.

Paychex WORX
Whether you have five minutes to read or 20-minutes to listen, visit the Paychex Worx online knowledge center to get informed on trending topics. Access articles, whitepapers, podcasts, and webinars on compliance, legislative updates, and state-specific content relevant to your firm and your clients.

> *"Nobody thinks they need HR help until they run into problems. We have a responsibility to help clients address one of their biggest challenges – if we're not talking about this stuff, we're doing them a disservice."*
>
> **Gregg Genovese,**
> Partner at The Bonadio Group and practice leader of the firm's Outsource Accounting & Finance Team, a Client Advisory Services (CAS) practice

Contact us today!

Call 877.264.2615
Learn more at CPA.com/Paychex

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