

Case Study

Strengthening Audit and Tax Delivery During Staff Shortages for a Leading CPA Firm in the US

Service(s) offered: **Audit, Tax, and Advisory**

Sector/Industry: **Accounting and CPA**



Seamless Audit, Tax, and Advisory Support During Peak Workload Periods

A US-based, innovation-focused CPA firm experienced a sharp rise in audit and tax engagements during its peak season. Internal bandwidth was limited, and there was a pressing need for technically sound, rapid-response support that could integrate seamlessly with the firm's processes and systems.

Challenge

- **Staff Shortages:** Limited internal bandwidth to handle increased audit and tax engagements
- **Time-Sensitive Deliverables:** Projects required immediate attention and rapid turnaround
- **Process Integration:** Need for strict alignment with firm-specific audit methodologies and tools
- **Quality Assurance:** Deliverables had to meet high internal standards and comply with US GAAP

Solutions

Nexdigm provided end-to-end support across audit, tax, and advisory functions, integrating seamlessly with the client's internal systems and methodologies. By deploying technically sound professionals, we ensured continuity, compliance, and high-quality delivery despite limited internal bandwidth and evolving timelines

Case Highlights

- Supported **multiple audit, tax, and advisory engagements**
- Delivered **audit-ready books and financials** under tight timelines
- Maintained **100% compliance with US GAAP** and client-specific standards
- Worked flexibly with **US-based teams across time zones**
- Enabled continuity during **critical staff shortages**

Full-Spectrum Engagement Support:

Managed compilation tasks including reconciliations, book clean-up, and verification of debtors and creditors. Conducted thorough review of all balance sheet and profit and loss captions, along with detailed reconciliations.

Audit and Tax Execution:

Prepared workpapers in line with US GAAP, performed sampling and verification using supporting documentation, calculated materiality thresholds, and drafted quarterly/year-end financial statements.

Disclosure and Filing Support:

Prepared notes and footnotes for financials—including loans and retained earnings tie-ins—and filed property tax returns across various clients.

Integrated Technology and Workflow:

Aligned with client's audit infrastructure by using Caseware for documentation, Suralink for audit communications, and confirmation.com and Adobe for sending confirmations.

Flexible and Responsive Resourcing:

Deployed a US GAAP—proficient senior executive who adapted to US time zones and methodologies, dynamically switching priorities for uninterrupted service.

Impact

Nexdigm's support enabled the client to maintain business continuity, uphold audit and tax timelines, and meet stringent compliance standards despite internal resource constraints. By seamlessly integrating with existing workflows and delivering consistently high-quality outputs, we not only reduced operational pressure but also enhanced the reliability of financial reporting. Our flexible engagement model allowed the client to stay agile during peak periods—without compromising on accuracy, speed, or regulatory alignment.

For more information on this case study, please write to us at:

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You can also visit our website to know how our services resulted in tangible business benefits:

www.nexdigm.com