

# The Smart Back Office

*Best practices for leveraging service-driven technology solutions that integrate with QuickBooks®.*

**GrowthForce**<sup>TM</sup>  
put your numbers to work

# Agenda

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## Help Elevate Your Clients' Businesses with Today's Technology

- Quick GrowthForce Overview
- Changing Landscape of Client Expectations
- The What, How & Why Behind GrowthForce's Smart Back Office (SBO)
  - Tools & Technology to Automate the Back Office
- Achieving Real-Time Financial Intelligence You Can Trust

# Quick Intro

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## Stephen King Pres. & CEO of GrowthForce LLC

### *Previously:*

- Pres., Insperity Financial Management Services
- Pres. & CEO, Virtual Growth
- CFO, Amnesty International USA
- Mgr., Ernst & Young Accounting System Design Grp
- CPA, own practice and with mid-market CPA firm

CPA in Texas and New York

Board member – Texas Society of CPAs and Houston CPA Society

Certified QuickBooks Professional Advisor

Chair, Houston Technology Center, Accounting Services Provider Network

Member AIPCA, PCPS

## Quick Intro

# What GrowthForce Does

### Outsourced Bookkeeping



Billing & Collections



Accounts Payable



Payroll



Banking & Credit Cards



Paperless Back Office



Automated Billing & Expenses



Dedicated U.S. Based Service Teams

### Outsourced Accounting



Reporting



Fraud Prevention Internal Controls



Budgeting & Cash Management



Sales & Payroll Taxes



Policies & Procedures



Job Costing

### Tech & Systems



System Design Optimization, Automation and Integration



Hosted QuickBooks in the Cloud



Reporting & KPIs



## The Smart Back Office

# How GrowthForce Works



### Set Up & Send Documents To The GrowthForce Portal

GrowthForce analyzes your QuickBooks File, automates your financial systems and develops a procedures manual defining every task to be performed.

You'll send documents directly to GrowthForce or upload via scan, fax or email. Documents are stored in The Cloud to create one safe, secure, paperless location.

- Vendor Bills
- Banking & Credit Cards
- Payments
- Receipts
- Time Sheets
- Expense Reports
- Additional Documents



### GrowthForce Does The Work

We assign a dedicated team in our U.S. based Service Centers to process transactions and provide daily, weekly and monthly services.

- Accounts Receivable
- Accounts Payable
- Bank Reconciliations
- Payroll & Sales Tax
- Disciplined Month-End Closing
  - Accruals, Matching Principle, Depreciation, Etc.
  - Lock Down Prior Periods



### GrowthForce Provides Financial Intelligence

Get instant insight into your financial health with Insperty™ Reveal™ Web-based financial dashboards and timely reports prepared by your dedicated team.

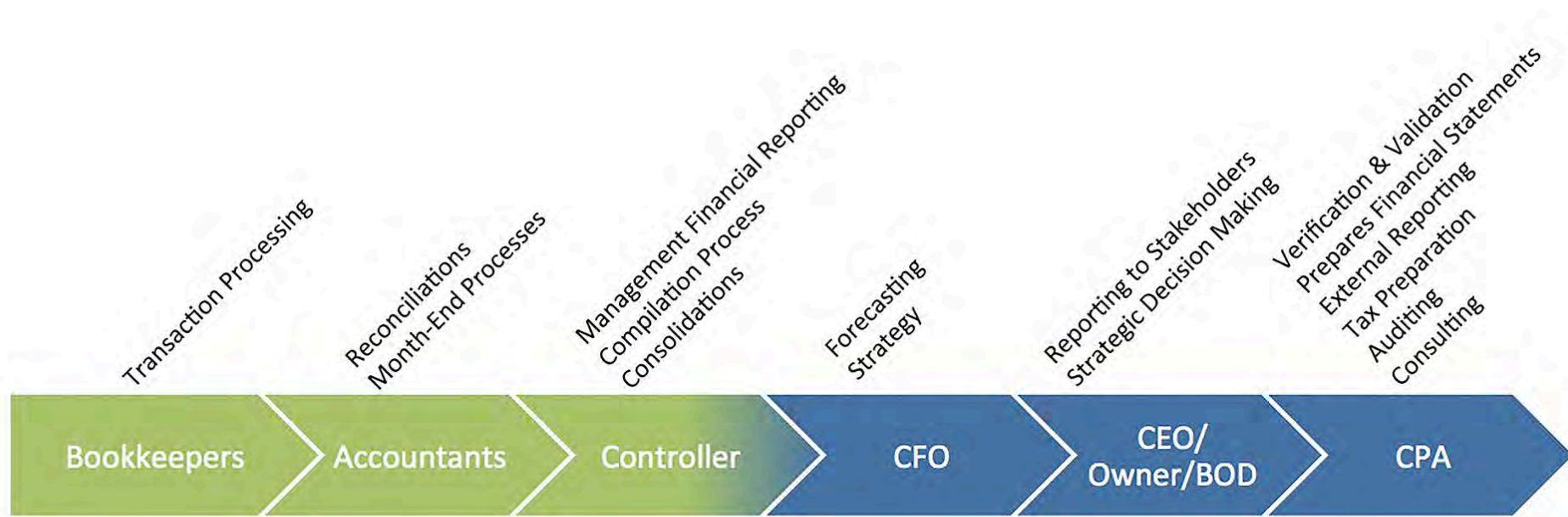
#### Weekly Reports:



- Aged Accounts Receivable
- Aged Accounts Payable
- Credit Card Transactions
- Cash Flow Forecast
- Suspense Items

#### Monthly Reports:

- Dashboard KPIs
- Profit & Loss – By Customer/Job
- Balance Sheet
- Cash Flow
- Other Specialized Reports
- SLI Reporting

# The Financial Management Chain



-  GrowthForce
-  Internal or 3<sup>rd</sup> Party

# What GrowthForce Does Not Do



Income Taxes	Compilation, Audits
After the Fact (AFT) Bookkeeping	Forecasts & Budgeting
Strategic Advisory/ Consulting	External Financial Reports

# A Changing Landscape

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## 1. Cloud 1.0

## 2. Cloud 2.0 - Integration Opportunities

- Bill Payment
- Time Tracking
- Document Management
- Payroll/Job Costing
- Business Intelligence Dashboard





# Start With *Why*?

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**THINK:**

*WHY* should my client buy?

**NOT:**

*WHAT* should my client buy?



“People don’t buy what you do, they buy why you do it!”

-Simon Sinek

Simon Sinek, Author, “*Start With Why: How Great Leaders Inspire Everyone to Take Action*”  
[http://www.ted.com/talks/simon\\_sinek\\_how\\_great\\_leaders\\_inspire\\_action.html](http://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action.html)

# What Clients Expect

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## Effective Technologies & Systems That:

- Reduce Costs
- Increase Efficiencies
- Streamline/Integrate Systems
- Standardize, Centralize Data
- Effectively Monitor Performance
- Improve Transparency & Insight
- Drive Business Outcomes



Source: "Technology and Growth at Mid-Sized Companies – The Next Ten Years," The Economist Intelligence Unit, 2007

# Helping Create A Client For Life

## Technology as a Competitive Advantage



“Best in class want **MORE TOOLS** and information **IN FRONT OF MORE DECISION MAKERS** to fully leverage all analytical minds. This **PROMOTES DATA-DRIVEN DECISION MAKING** across all lines of business.”

“Best in Class Reporting and Dashboards – The Workhorse of Analytic, April 2014 Business Analytics Survey, Aberdeen Group

# Power of Integration

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# Unleash The Power Of QuickBooks®

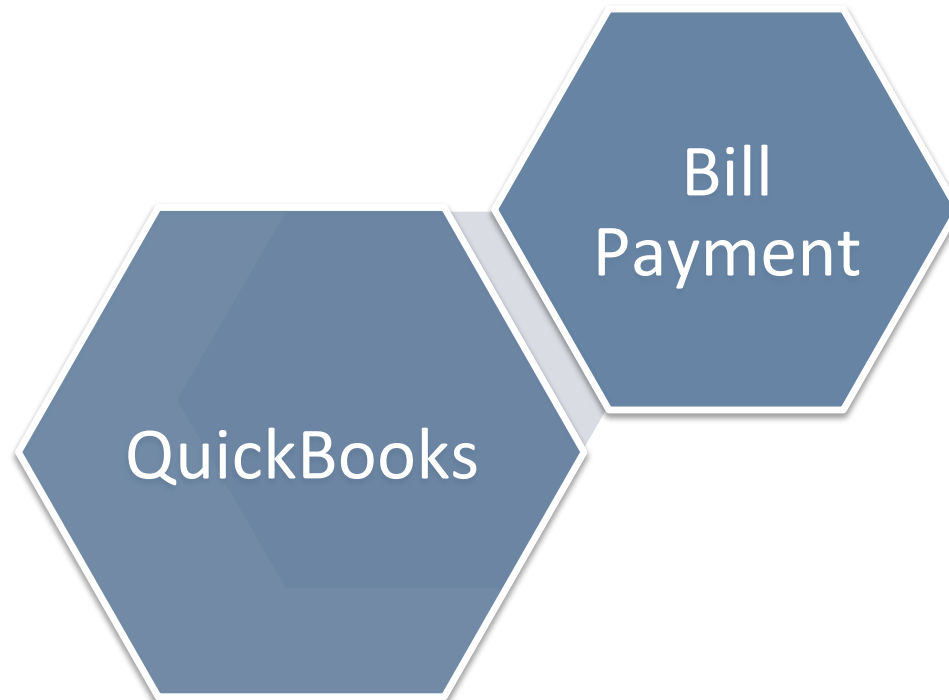
- Audit trail
- Accountants Copy
- Close prior periods
- Consolidated financials
- Custom fields
- Batch processing
- Multi-currency
- Multi-location Inventory





# Power of Integration

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# Payables

10 billion B2B transactions are processed in U.S. annually.



\$58.09

Range in cost per transaction



\$1.50



## PAPER

1. Pick Up Mail
2. Open Mail
3. Process Bills
4. Post Bills
5. Send Report to Approver
6. Review with Approver
7. Coordinate with Vendor
8. Repeat...
9. Generate Check Run
10. Stuff Checks
11. Mail Checks
12. Coordinate with Vendor
13. Reconcile Bank Account
14. Repeat...

## ELECTRONIC

1. Bills automatically sent to Inbox
2. Coded, Routed for Approval
3. Approved
4. Paid (ePayment)

Aberdeen Group report, 2007

## Solution 1:

# Bill Payment

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### Increase productivity & lower costs

- Reduces A/P and A/R processing costs
- Improves visibility for better cost control
- Eliminates time-consuming paper processes



### Improve visibility & accessibility

- Paperless document imaging
- Easy online access to exchange information with the people who need access

**Reduce your dependence** on error-prone paper processes

Get GrowthForce Discount Rate At:

<http://cashflow.bill.com/growthforcelandingpage.html>

# Sync with Your Accounting Software System

## The Big Picture: Sync and Reconcile



You pay your bills

- May 21  
\$2,112.99 to Blue Apple Design ↗
- June 5  
\$656.21 to Blue Apple Design
- July 8  
\$2940.00 to Blue Apple Design  
\$3400.00 to The Demo Coach

**Each Day**  
We make ONE transaction with your bank for the total payment:

- May 21 \$2,112.99
- June 5 \$656.21
- July 8 \$6340.00



**Your Bank Statement**

TRANSACTION DETAILS		DEBITS	CREDITS	BALANCE
Balance brought forward				35.00
8 May	CD01 High St	19.43		15.57
8 May	DC07 Per Care Pk	2112.99		22.58
11 May	BACS Regular Wages		46.50	69.08
19 May	CH07	2.70		66.38
19 May	DD Gen & Cr	656.21		49.17
22 May	90 TV Licence Company	6340.00		28.17

Reconcile your bank statement with the daily transactions from the BillCom Clearing account ↕

### Your Accounting System

Date	Number	Account	Payee	Memo	Payment	✓	Deposit	Balance
05/19		GENJRNL Default Checking Account	Bill.com 05/19/09 payments				19.43	0.00
05/21	Bill.com	Blue Apple Design			2,112.99			-2,112.99
05/21	BILLPMT	Accounts Payable bdc	https://app.bill.com/BillPay?id=bc				2,112.99	0.00
05/21		GENJRNL Default Checking Account	Bill.com 05/21/09 payments					0.00
06/05	Bill.com	Blue Apple Design			656.21			-656.21
06/05	BILLPMT	Accounts Payable bdc	https://app.bill.com/BillPay?id=bc				656.21	0.00
06/05		GENJRNL Default Checking Account	Bill.com 06/05/09 payments					0.00
07/08	Bill.com	Blue Apple Design			2,940.00			-2,940.00
07/08	BILLPMT	Accounts Payable bdc	https://app.bill.com/BillPay?id=bc					0.00
07/08	Bill.com	The Demo Coach			3,400.00			-6,340.00
07/08	BILLPMT	Accounts Payable bdc	https://app.bill.com/BillPay?id=bc					0.00
07/08		GENJRNL Default Checking Account	Bill.com 07/08/09 payments				6,340.00	0.00

**Each Sync**  
We copy each bill payment you made (with Bill.com) to the BillCom Clearing account in your accounting system \*  
  
We enter each day's total bank transaction for all bill payments \*\*



\* You tell us which account to use as the BillCom Clearing account (or we create one for you)  
\*\* QuickBooks Desktop, QuickBooks Online (through IPP), and Intacct only.  
Other accounting systems: you enter the daily transaction yourself.

## GrowthForce Case:

# Benefits of Online Bill Payment Technology

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“

The last thing I wanted to do was build and maintain an in-house accounting department and not be highly automated in the cloud to accept information flow from many locations.”

-Sam Chase, Wellpath CEO



### Saves Time

GrowthForce introduces additional efficiencies, such as requiring all vendors to submit electronic invoicing and the submission of W-9 form by every contract worker prior to first payment.

### Saves Money

Fully paperless process

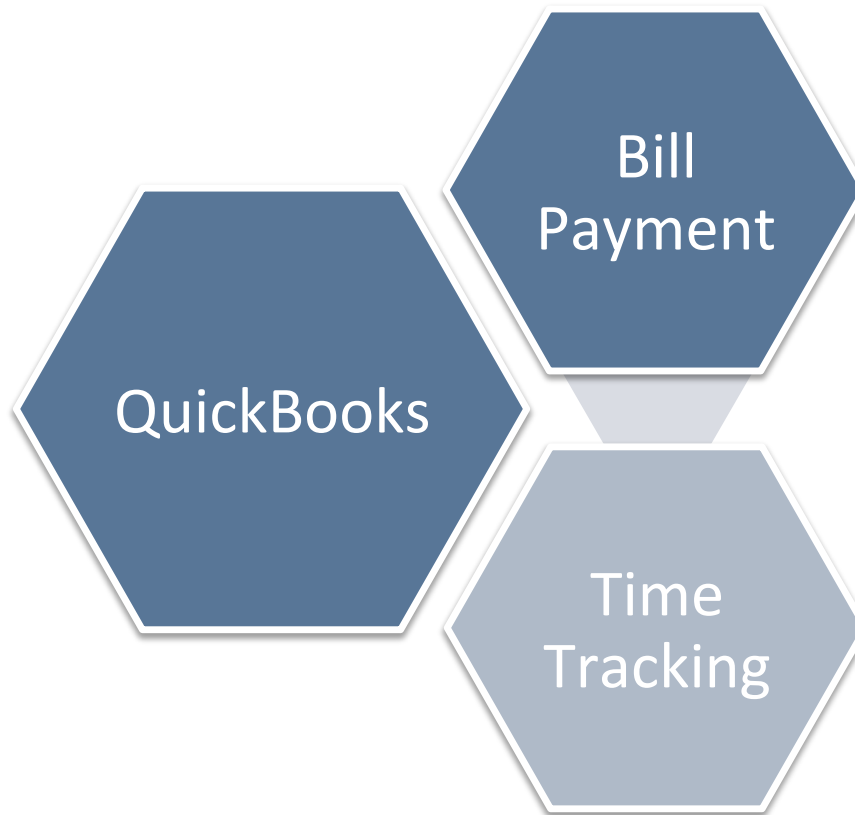
### Reduces Risk For Fraud

Scanned images with every transaction, procurement audit and accounts receivable review



# Power of Integration

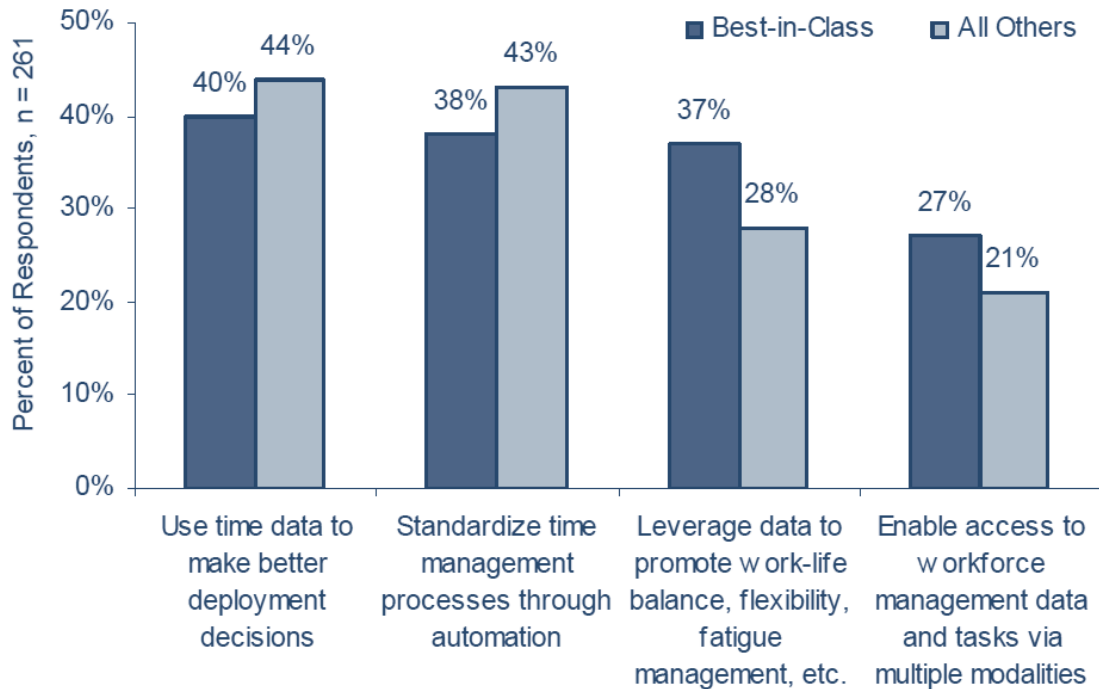
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# Solution 2: Time Tracking

Automated Timekeeping Becomes a Performance Power House When Integrated With Payroll, Scheduling & Leave Management.

## Top Strategic Actions



Respondents asked to choose top two. Aberdeen Group 2011

## Proven Products

 SpringAhead

 Insperty™  
TimeStar®

 GHG Corporation



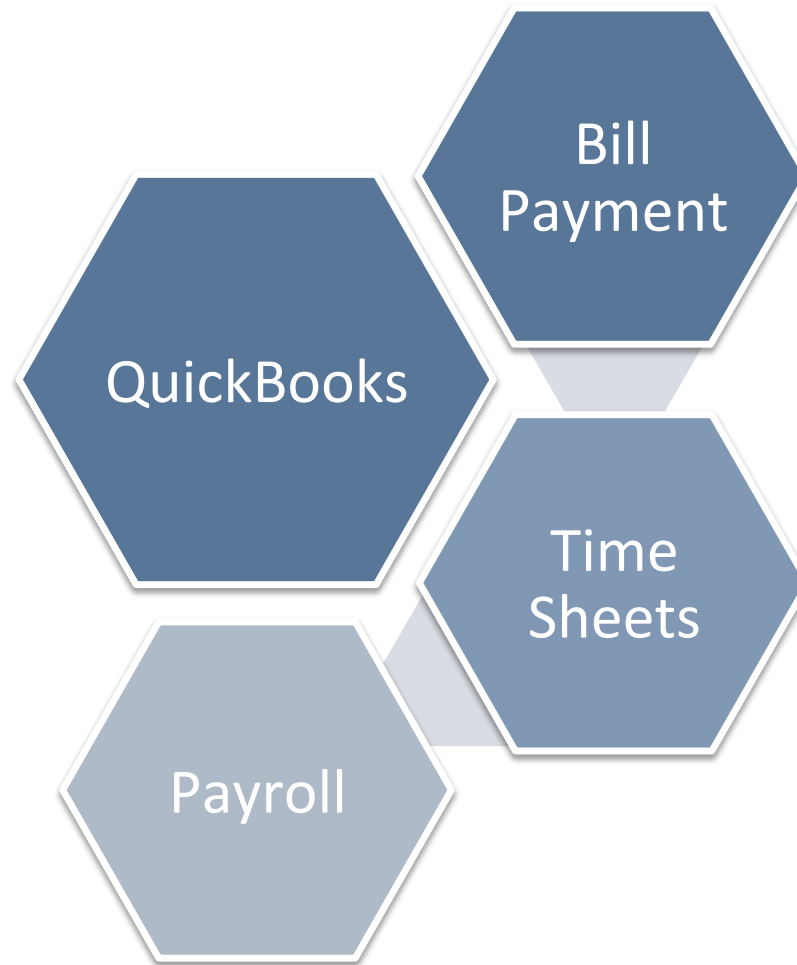
T-SHEETS



 SwipeClock™  
Simple. Affordable. Time & Attendance

# Power of Integration

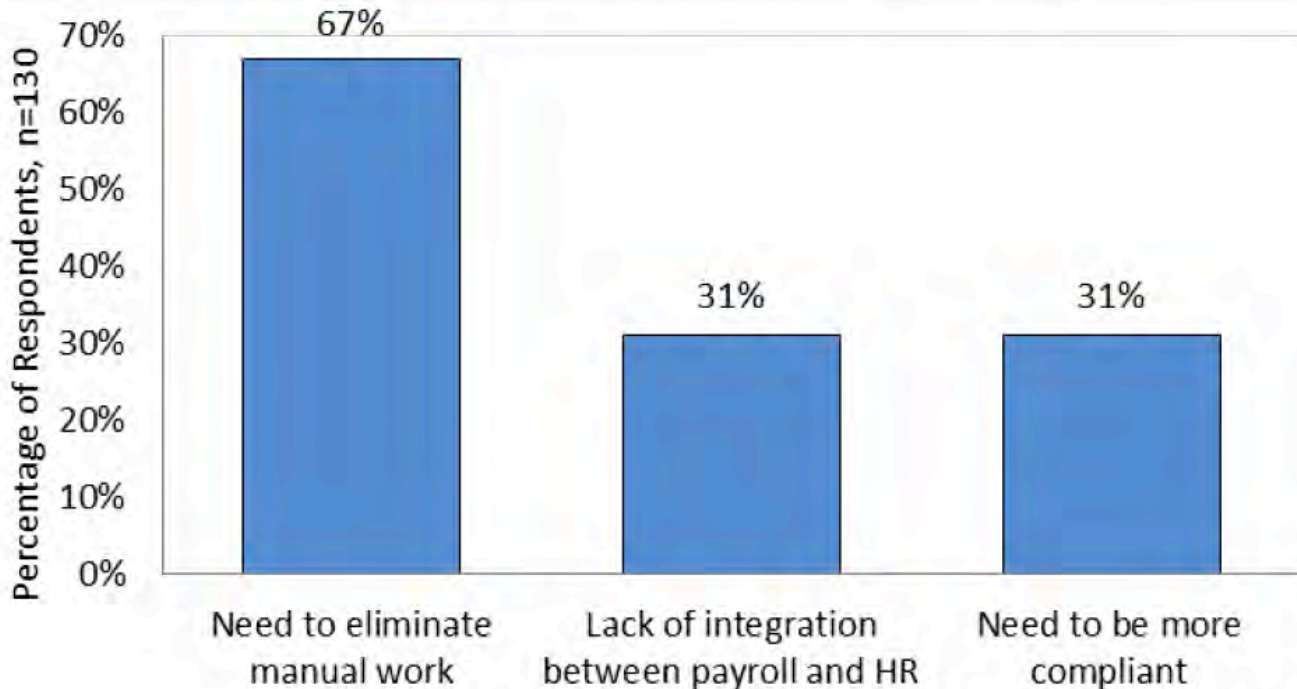
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# Solution 3: Payroll

82% of SMB organizations invest in third-party payroll solutions

## Key Drivers in the SMB Market for Payroll Services



Source: Aberdeen Group, April 2013

Proven Products

**intuit.**  
Payroll

**Insperity**  
Payroll  
Services

**CERIDIAN**

**PAYCHEX**

**ADP**

## GrowthForce Case:

# Benefits of Time Tracking & Payroll Technology

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### Save Time & Money

Financial systems automation reduces need for duplicate entry.

### Achieve Financial Intelligence

GrowthForce uses payroll details to **create job costing report for CEO.**

### Reduce Risk For Fraud

GrowthForce introduced separation of duties to deter fraud and review procedures to detect both theft and human errors.



# Power of Integration

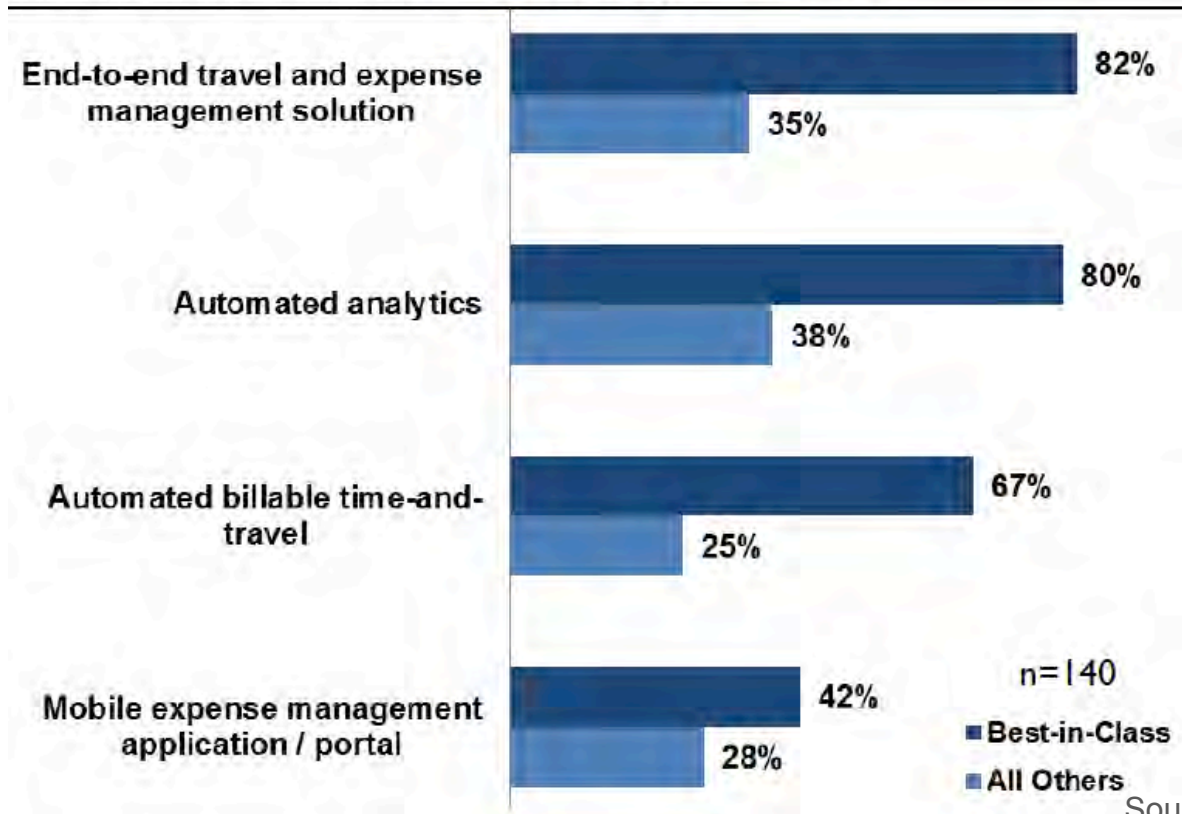
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# Solution 4: Expense Management

T&E expenses account for 8-12% of the average organization's total budget.

## Best-in-Class Technology Utilization



## Proven Products

 SpringAhead

 Insperty  
ExpensAble

 C.ncur

 CloudSway

 neXnia

Source: Aberdeen Group, February 2012

## GrowthForce Case:

# Benefits of Expense Management



### Save Time & Money

No manual spreadsheets to authorize, speeds up approval process, no duplicate entry.

### Achieve Financial Intelligence

Integrations allow GrowthForce to create job costing by expense reports for CEO.

### Reduce Risk For Fraud

Two authorized electronic approvals within Tallie and paying approver in Bill.com. Monthly review of all financial information by several sets of eyes further protects against fraud.



# Power of Integration

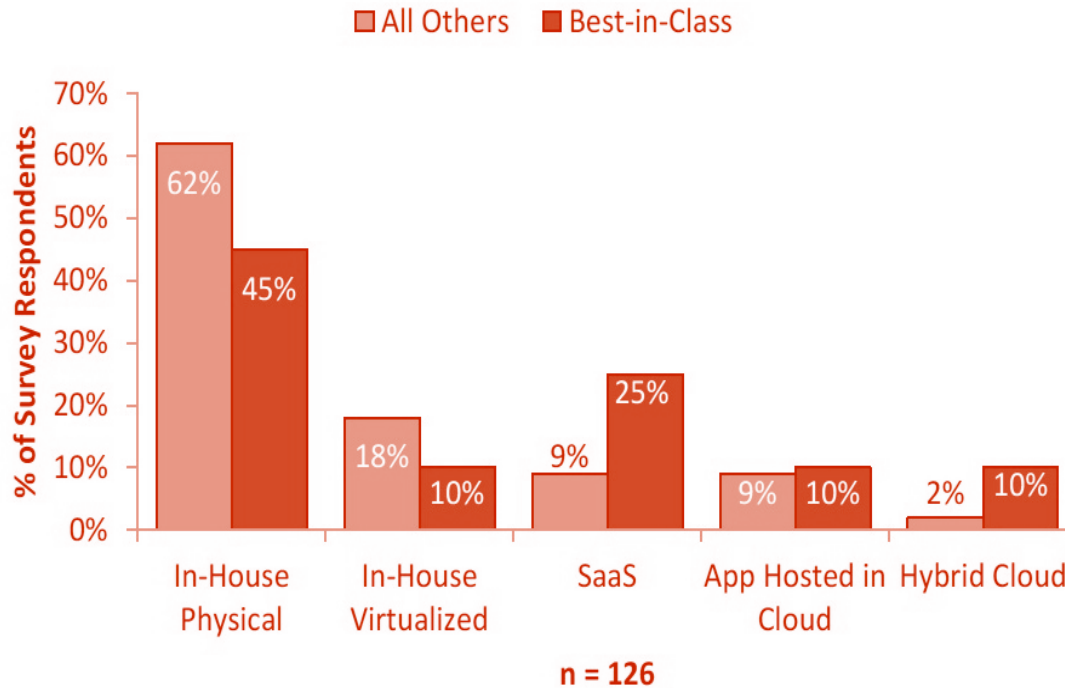
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## Solution 5:

# QuickBooks Hosting & Document Management

### Finance or Accounting Application Deployment Choices



GrowthForce  
Proven Product List

Right Networks

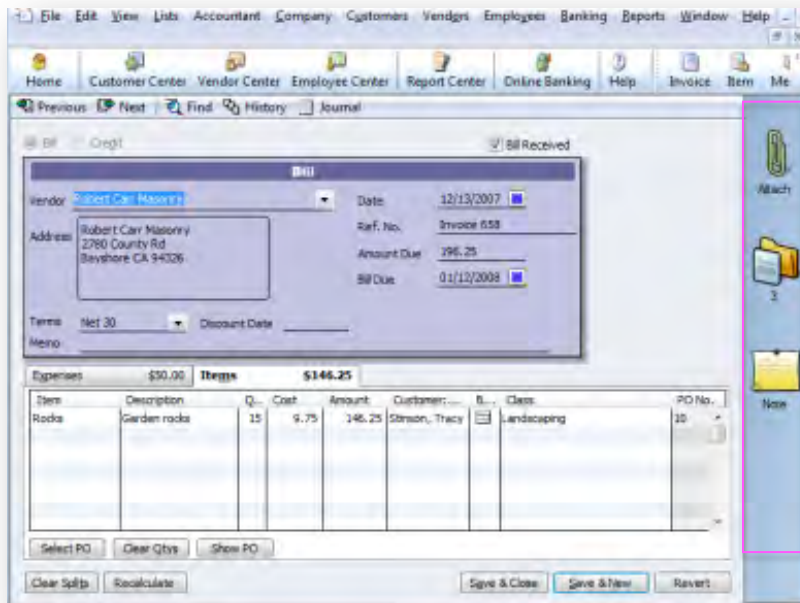


Source: Aberdeen Group, 2013

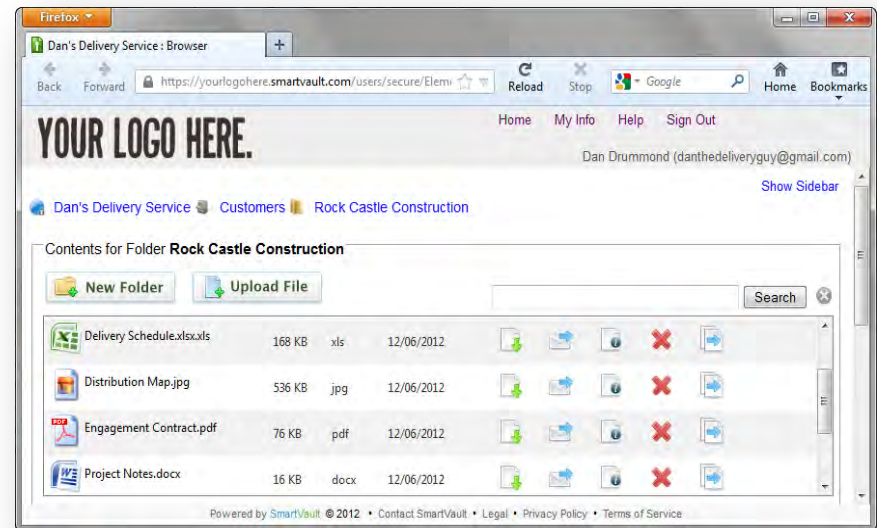
# Two Primary Components

## SmartVault

**Attach and view files** right from apps like QuickBooks



**Full DMX capabilities** – including document storage and secure portal for sharing files



**Interested? Sign up at:**

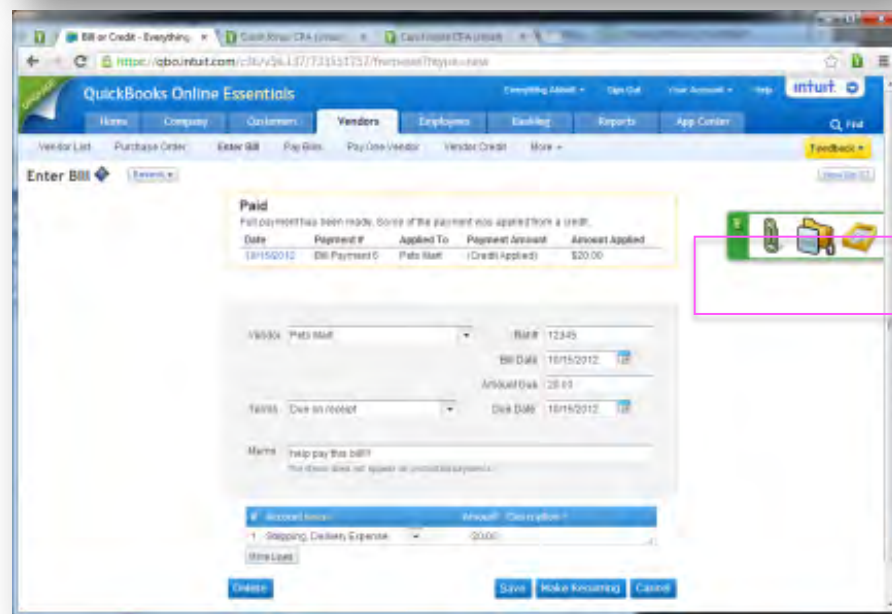
[https://my.smartvault.com/link/?GrowthForce\\_general](https://my.smartvault.com/link/?GrowthForce_general)

# SmartVault

## Attach documents directly to entries in QuickBooks & QuickBooks Online

- Single repository for all financial data and all related source documents
- Files are stored in the cloud – accessible 24/7

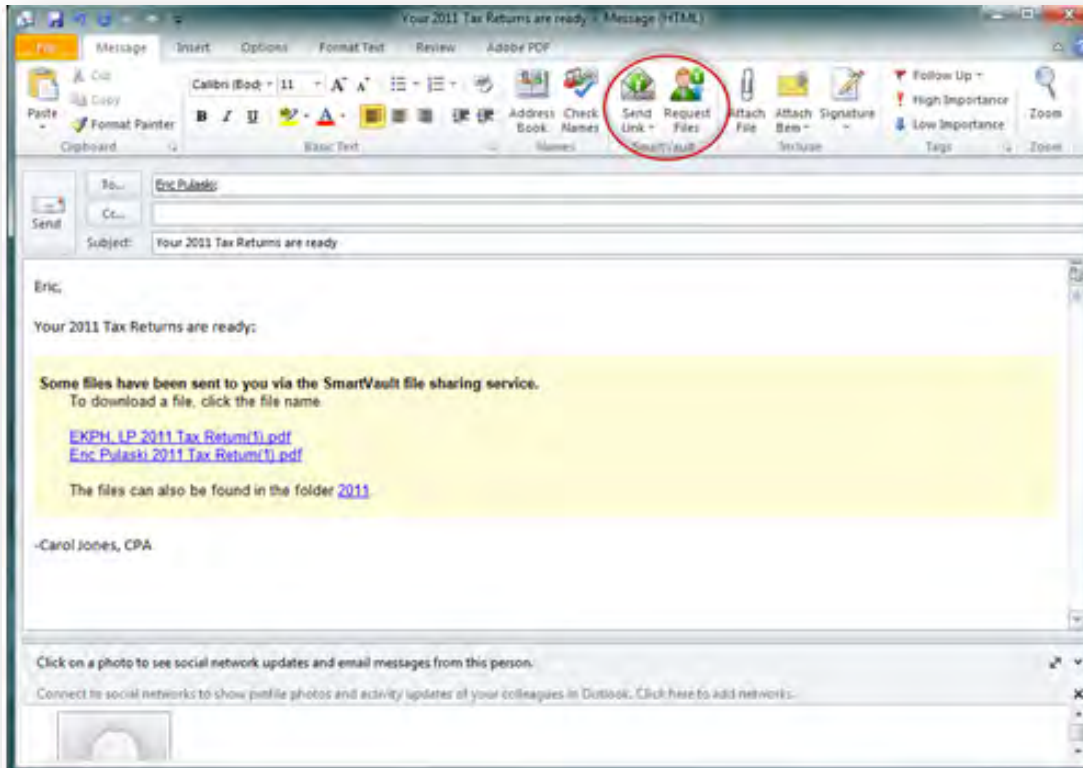
## Always Audit-Ready!





# SmartVault

## Upload, Manage and Share Files, Right from MS Outlook



- Upload email attachments from Outlook right to SmartVault
- Send secure links to files and folders, and add users to a folder – **all without leaving Outlook.**

**Interested? Sign up at:**  
[https://my.smartvault.com/link/?GrowthForce\\_general](https://my.smartvault.com/link/?GrowthForce_general)

# **Benefits of Hosted QuickBooks**

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## **GrowthForce Clients Get:**

- Anywhere, Anytime Access
- Enterprise-Class Reliability, Data Security & Nightly Back-ups
- Automatic Application Upgrades with Software Leasing
- Top-of-the-Line Hosting Facilities
- Simplified PC, Server & Network Maintenance

## Solution 6:

# Reporting Dashboard/KPI

## Executives Leveraging Real-Time Data Analytics Achieve:

- 14%** Improvement in operating profit;
- 14%** Improvement in cash flow, which is **2x's** the rate of all others; and
- 6%** Reduction in operation costs.

Source: Aberdeen Group 2014 Business Analytics Survey

### Proven Products

 Insperity™  
Reveal™

 profitcents™  
By Sageworks

 Corelytics™

 QQube™

 Qvinci™

 BizTools®  
Intelligent Business Software

 BodeTree

 webKPI

 Sage Alchemex

 PowerPivot



## GrowthForce Case:

# Benefits of Dashboard Technology

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Insperity Reveal Helps Non-Financial CEO Stays on Top Of His Numbers:

### Auto-Sync

Seamlessly syncs with QuickBooks® file.

### Dashboard

Scan company financials anytime, anywhere without opening QuickBooks.

### Alerts

Email notifications alert to issues within your QuickBooks file.

### Cash Flow Forecasting Tool

Improve cash position with easy drag & drop tool.

“  
The charts, alerts, reports, it’s all just great to have. I am now more prepared to forecast our income and plan accordingly with respect to purchasing and hiring decisions.”

Ben Rife

Pres. @ Invoip, Integrity Networks



# Access All Clients With One Log In

Your logo here:



Welcome Insperty! [ Log Off ]  
Account Active Until: 12/22/2013

**GrowthForce**<sup>TM</sup>  
we put your numbers to work

My Account | CPADashboard | Companies | 1-855-5REVEAL **Insperty Reveal**

## Companies

T MTD **<M** <Q YTD <Y From: 09-01-2013 To: 09-30-2013

	Revenue	Gross Profit	Net Income %	Cash Balance	Cash Flow	Total Users
<b>Clients</b>						
Larry's Lawn Service	192,405	183,064	80.50	58,584	CF	0/5
Global Energy	0	0	0	29,148	CF	0/5
						0/20

# Easy to Use Dashboard





# Easy Access Charts & Reports

Your Logo Here



Larry's La  
Last Sync  
Account Active Until

My Account | CPADashboard | Companies | 1-855-5R

- DASHBOARD
- CHARTS & REPORTS
- CASH FLOW FORECASTER
- DIAGNOSTIC
- GROWTHFORCE
- SETTING

Income	Balance Sheet	Accountant	People
<a href="#">Profit &amp; Loss Dashboard</a>	<a href="#">Balance Sheet</a>	<a href="#">Budget vs Actual</a>	<a href="#">Labor Dashboard</a>
<a href="#">Gross Revenue \$K</a>	<a href="#">Comparative Balance Sheet</a>	<a href="#">General Ledger Accrual</a>	<a href="#">Income and Expenses per FTE</a>
<a href="#">Gross Profit \$K</a>	<a href="#">A/R Aging Summary</a>	<a href="#">Trial Balance Accrual</a>	<a href="#">Realization rate per Labor Hour</a>
<a href="#">Net Income \$K</a>	<a href="#">A/P Aging Summary</a>		<a href="#">Utilization per Labor Hour</a>
<a href="#">TTM Gross Revenue \$K</a>	<a href="#">Days Sales Outstanding (DSO)</a>		
<a href="#">TTM Gross Profit \$K</a>			
<a href="#">TTM Net Income \$K</a>			
<a href="#">Profit and Loss Accrual</a>			
<a href="#">Comparative P&amp;L</a>			
<a href="#">Profit and loss by job</a>			
<a href="#">P&amp;L by Class</a>			



# Finance For Non-Financial CEOs

**GrowthForce**<sup>™</sup>  
we put your numbers to work

Larry's Lawn Service  
Last Sync: 10/23/2013  
Account Active Until: 12/22/2013

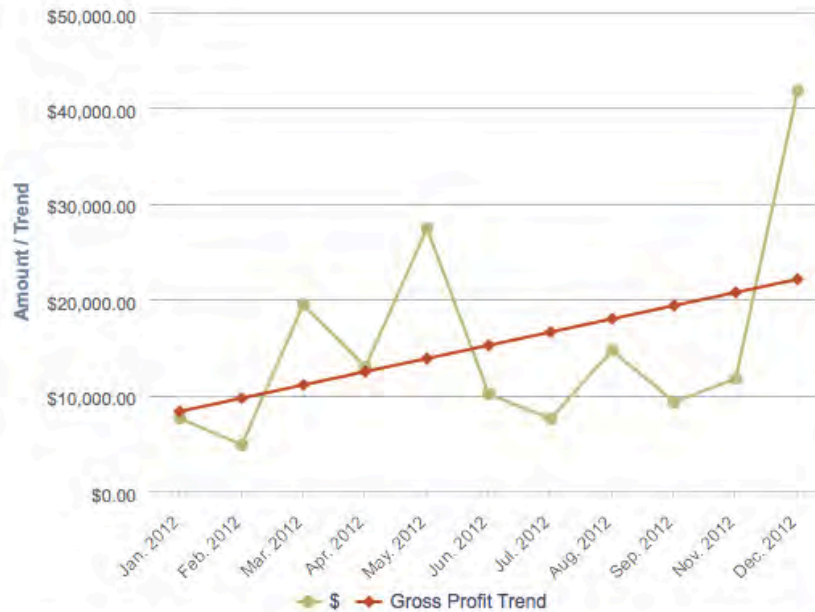
Insperty  
Reveal

My Account | CPADashboard | Companies | 1-855-5REVEAL

DASHBOARD | CHARTS & REPORTS | CASH FLOW FORECASTER | DIAGNOSTIC | SETTINGS

Gross Profit T MTD <M <Q YTD **<Y** From: 01-01-2012 To: 12-31-2012

Sort By: Default Old Reports: Select a saved report Load Save Print



Income	\$204,035
COGS	- 36,780
<b>Gross Profit</b>	<b>\$167,255</b>

Hide Explanation

## Gross Profit \$K - What is this?

Gross profit margin represents the percentage of each dollar of your company's revenue that is available to cover fixed costs after paying for the goods or services that were sold. It is calculated by taking the difference between sales and the costs of goods sold divided by revenue.

Gross Profit = Sales - COGS

## Why is this important?

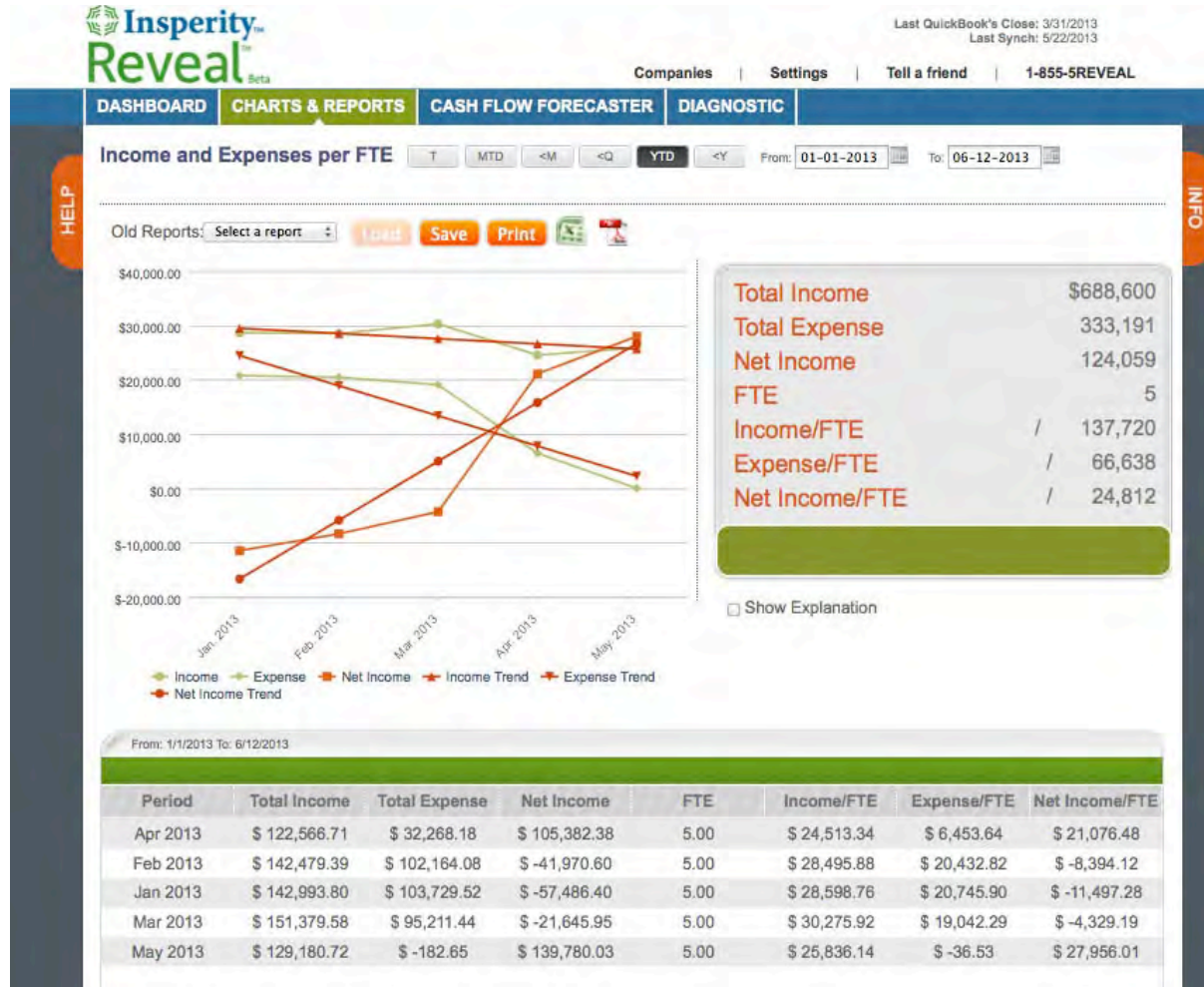
# Drill Down To Detailed Transactions

Sort By:

From 1/1/2012 To 12/31/2012

Type	Date	Num	Name	Memo	Class	Amount
<b>Total Job Materials</b>						<b>81,527.8</b>
<b>Decks &amp; Patio</b>						<b>1,560.0</b>
Bill	3/4/2013		Sena Lumber & Building Materials	Rough Lumber	Lar	390.0
Bill	3/11/2013		Sena Lumber & Building Materials	Rough Lumber	Lar	390.0
Bill	3/18/2013		Sena Lumber & Building Materials	Rough Lumber	Lar	390.0
Bill	3/25/2013		Sena Lumber & Building Materials	Rough Lumber	Lar	390.0
<b>Cost of Goods Sold</b>						<b>449.8</b>
Bill	3/4/2013		Conner Garden Supplies	Soil, 2 cubic ft bag		0.0
Bill	3/11/2013		Conner Garden Supplies	Soil, 2 cubic ft bag		0.0
Invoice	3/11/2013	1-103	330 Main St.	Garden Lighting	Lar	238.8
Bill	3/18/2013		Conner Garden Supplies	Soil, 2 cubic ft bag		0.0
Bill	3/25/2013		Conner Garden Supplies	Soil, 2 cubic ft bag		0.0
Invoice	3/25/2013	1-141	330 Main St.	Sprinkler heads		28.1
Invoice	3/25/2013	1-141	330 Main St.	Plastic sprinkler piping		63.0

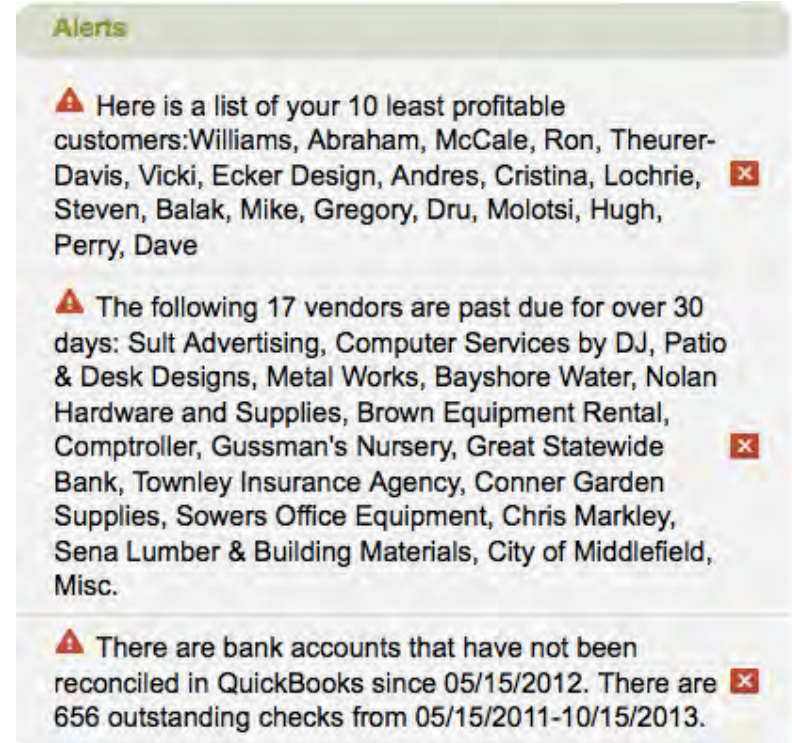
## Income & Expenses by FTE



# Stay Ahead of the Game

## Make Competitive Business Decisions Based On Real-Time Financial Information Alerts:

- Cash at hand
- Receivables
- Payables
- Gross Profit
- Expenses



The screenshot shows an email alert interface with a green header labeled "Alerts". It contains three distinct alert messages, each starting with a red triangle warning icon and ending with a red "X" icon in a square. The first alert lists the 10 least profitable customers. The second alert lists 17 vendors past due for over 30 days. The third alert reports on bank accounts not reconciled in QuickBooks since May 2012, mentioning 656 outstanding checks.

**Alerts**

⚠ Here is a list of your 10 least profitable customers: Williams, Abraham, McCale, Ron, Theurer-Davis, Vicki, Ecker Design, Andres, Cristina, Lochrie, Steven, Balak, Mike, Gregory, Dru, Molotsi, Hugh, Perry, Dave

⚠ The following 17 vendors are past due for over 30 days: Sult Advertising, Computer Services by DJ, Patio & Desk Designs, Metal Works, Bayshore Water, Nolan Hardware and Supplies, Brown Equipment Rental, Comptroller, Gussman's Nursery, Great Statewide Bank, Townley Insurance Agency, Conner Garden Supplies, Sowers Office Equipment, Chris Markley, Sena Lumber & Building Materials, City of Middlefield, Misc.

⚠ There are bank accounts that have not been reconciled in QuickBooks since 05/15/2012. There are 656 outstanding checks from 05/15/2011-10/15/2013.



# Client Accounting Services

## The Need For Speed in Real-Time Financial Reporting



1. Respondents' Top Priority: **“Faster Delivery of Financial Information.”**
2. Best-in-Class Organizations are 62% more likely to have **Real-Time Financial Metrics**, and 2.7 times more likely to have automated financial reporting with narrative analysis.
3. Organizations with real-time access to financial performance have **improved their decision-making time** by 11% in past year.

Source: “2014 Excellence in Financial Management Survey, Aberdeen Group June 2014.

# Client Accounting Services

## 7 Areas BPO Can Boost Your Clients' Value

1. Provide flexibility for changing volumes
2. Prepare for changing business conditions
3. Improve entire process
4. Improve performance in other parts of org.
5. Create additional sources of value in the future
6. Deliver business outcomes not originally expected
7. Increase top-line performance

Source: "Achieving High Performance in Business Process Outsourcing (BPO)," Accenture Report, 2012.



Beyond Bookkeeping

# SWAS – Software With A Service

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## Removal of Burden

Hiring, Training, Retraining, Office Space, PTO, Leave  
Total Financial Systems Design & QuickBooks Integrations & Automations  
More Time & Resources Towards Building The Business

## Peace of Mind

Dedicated Team & Tech Expertise (“SWAS”)  
Clean, Accurate & Timely Set Of Books  
Audit-Ready, Year Round!  
Reduce Fraud With Internal Controls  
Expertise-As-Needed Without Adding Staff

## Financial Intelligence

Custom Reporting Packages Deliver Financial Foundation For Success  
Operational Efficiencies  
Anytime, Anywhere Access to Real-Time Financial Intelligence From Web-Based Dashboard

*“Why wouldn’t I just  
hire a bookkeeper  
or local bookkeeping  
service?”*



## Quick Intro

# What GrowthForce Does

### Outsourced Bookkeeping



Billing & Collections



Accounts Payable



Payroll



Banking & Credit Cards



Paperless Back Office



Automated Billing & Expenses



Dedicated U.S. Based Service Teams

### Outsourced Controller



Reporting



Fraud Prevention Internal Controls



Budgeting & Cash Management



Sales & Payroll Taxes



Policies & Procedures



Job Costing

### Tech & Systems



System Design Optimization, Automation and Integration



Hosted QuickBooks in the Cloud



Reporting & KPIs

# We Don't Compete with CPAs

GrowthForce	Potential Overlap	CPA Firms
<b>Real Time Bookkeeping</b> <ul style="list-style-type: none"><li>• Transaction Processing</li><li>• Bill Payment</li><li>• Sales &amp; Invoicing</li><li>• Collections</li><li>• Deposits</li><li>• Payroll</li><li>• Banking &amp; Credit Cards</li><li>• Sales &amp; Payroll Taxes</li><li>• Internal Controls</li></ul>	<b>Controller Services</b> <ul style="list-style-type: none"><li>• Account Reconciliation</li><li>• Month-End Closing Process</li><li>• Financial Statement / KPIs</li></ul> <b>Accounting Systems Design</b>	Financial Statement Analysis Audit Services Tax Services  <b>Consulting Services</b> <ul style="list-style-type: none"><li>• Budget &amp; Business Planning</li><li>• Personal Financial Planning</li><li>• Wealth Management</li></ul>

## GF Helps CPAs Do Their Job

GrowthForce Feeds CPAs  
Accurate, Timely Financials

## GF Menu Based Services

CPA Controls Client  
Relationship & Decides Which  
Services to Provide

## GF Improves Firm Profitability

Helps Firm Focus on Higher  
Value, Trusted Advisor Services

Beyond Bookkeeping

# Financial Intelligence at Your Fingertips



## Next Two Weeks: Free Phone Consultation with Stephen King

- Discover how GrowthForce and Insperity Financial Services can help increase your value to your clients!
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*Email: [stephen@growthforce.com](mailto:stephen@growthforce.com)*

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# Stay Connected

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**Stephen King**

President & CEO

(281) 312-6502

[stephen@growthforce.com](mailto:stephen@growthforce.com)



**Michal Johnson**

Business Dev. Mgr.

(281) 312-6520

[Michal.johnson@growthforce.com](mailto:Michal.johnson@growthforce.com)

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