

# Xpita<sup>x</sup>

Innovative Outsourcing for the Accounting Profession.



Xpita<sup>x</sup>  
[www.xpita<sup>x</sup>.com](http://www.xpita<sup>x</sup>.com)



## Innovative Outsourcing Solutions.

Outsourcing to Xpitax empowers you to achieve greater profitability.

Xpitax delivers a full range of tax and accounting services for firms of all sizes and specialties, including preparation of individual and entity tax returns, as well as bookkeeping, audit support, back-office accounting, financial analysis, write-up work, and special projects.

Xpitax's chartered accountants and accountants are trained in U.S. and Canadian tax and accounting procedures. Offloading data intensive work to skilled professionals gives you and your staff time to focus on the more valuable, highly specialized services that have evolved from years of relationship building and professional experience.

Xpitax's dedicated team approach and proven infrastructure ensure fast turnaround on a high quality product. The resulting flexibility and reliability enables you to tap into an always-ready resource that serves as an extension of your firm's capabilities.

## Experienced Staffing Resource.

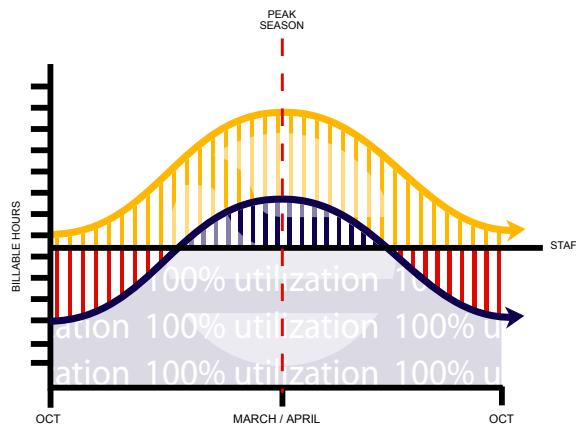
Xpitax's outsourcing services enable your firm to achieve 100 percent utilization using just-in-time staffing for peak days, weeks, months, and seasons.

### Xpitax, LLC

Xpitax™  
tax preparation outsourcing

Xpitax Accounting™  
outsourcing services

Xpitax™ bookmarking services



- FIRM A : WITHOUT XPITAX AND XCM
- FIRM B : USING XPITAX AND XCM
- FIRM B'S PROFIT ZONE & WITHOUT BURNOUT
- FIRM A'S PROFIT ZONE & WITHOUT BURNOUT
- LOSS ZONE
- 100% UTILIZATION

## Knowledgeable People.

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Xpitax was founded by CPAs to address the unique needs and concerns of the accounting profession. Xpitax understands that the underpinning of a successful practice is the knowledge and experience of its talented employees.

With that appreciation, Xpitax has assembled an international team of tax, accounting, client service, and technology professionals, led by a U.S. based Quality Assurance Officer and a management team with over 75 years in public accounting. Xpitax employs the same high standards as North American firms in recruiting and hiring accountants and chartered accountants to staff our overseas operations.

## Dedicated Team Approach.

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Xpitax's dedicated team approach gives you a consistent, reliable pool of expertise that is constantly building on its knowledge base to serve as an extension of your in-house staff. To that end, Xpitax LLC has formally incorporated our India offices as Xpitax Solutions Private Ltd. to guarantee control in developing that continuity.

This distinctive model gives you the assurance of knowing who is working on your tasks, and proprietary collaboration tools allow you to communicate directly with your team supervisor. Each team is set up to meet your specific needs and mirrors the hierarchy within your firm — from entry-level bookmarkers through experienced managers and supervisors.

“Our experience outsourcing work to Xpitax has been exceptional. Our India team was put to the test with an accounting file that was very heavy in securities transactions. They really rose to the occasion. We were ecstatic with the quality and speed of their work, and particularly with the dedication and professionalism of our team supervisor who worked through a holiday to complete this task.”

– Ken Schultz, CA,  
Principal,  
Integra Solutions, LLC

## Continuous Education and Training.

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“Over the past three years, Xpitax has consistently exceeded our expectations. The bar is always getting higher and we’ve been continuously impressed with the quality product that Xpitax delivers.”

– Gary Hayes, CPA,  
Shareholder,  
Tofias PC

Xpitax professionals undergo a year-round training program, which begins with U.S. and Canadian social and economic culture topics. The cycle continues with extensive in-depth training in U.S. and Canadian tax laws and accounting procedures, as well as training on tax, bookkeeping, and accounting software packages.

Xpitax employs a variety of vehicles to train our staff, including classroom education, video-conferencing and onsite trainers, onsite deployment at a client location, and regular reading of selected journals and publications. During tax season, onsite support from the U.S. Quality Assurance Officer ensures high quality results with 24-48 hour turnaround.

## Quality Assurance.

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Under the direction of the U.S. Quality Assurance Officer, Xpitax collaborates with and solicits feedback from our broad client base to continuously enhance and improve our flagship tax and accounting outsourcing services. To that end, Xpitax conducts an in-depth, annual client survey to help measure the quality of our services and leverages an annual User Conference as a forum for sharing best practices.

At Xpitax, we pride ourselves on the strong reputation we have built for delivering unsurpassed quality. We have refined our processes and developed innovative tools to provide a strong framework for delivering quality services.



## Proven Security.

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As a pioneer in outsourcing for the accounting profession, Xpitax understands that security and privacy are a paramount concern for you and your clients. Xpitax has built an extensive network infrastructure integrating multiple layers of security to protect our U.S. datacenter and overseas offices.

Secure storage of all uploaded information in our fully redundant U.S. datacenter, accessed remotely by overseas accountants, ensures that your confidential client data never leaves the U.S. Thorough background checks are performed on all employees. No personal communication tools are allowed nor made available within the overseas offices. Xpitax's accountants have no means to print, copy, save, or write-down sensitive client information.

## Standardized Deliverables.

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Xpitax's standardized process and deliverables make it easy to send and review your outsourced work. Outsourcing work to Xpitax is as easy as a click of a button. And, Xpitax's custom-developed Adobe bookmarking tool ensures that all workpapers are organized, bookmarked, and annotated in a standard format to enable more efficient online review.

The XCM workflow automation software controls the process and serves as an information repository for sharing issues and points online between your firm and Xpitax team. The end result is a smooth process with clear accountability and the creation of standard workflows for your firm.

"Not only is outsourcing to Xpitax easy, but our experience has served as a model for our internal processes. We are moving toward a paperless office and, due to using Xpitax last year, we have a perfect example of the workpaper setup and methodology to utilize. We were extremely impressed with the preparation and workpaper quality."

– Jason Hamblin, CPA,  
Shareholder,  
Cohen & Grieb, P.A.



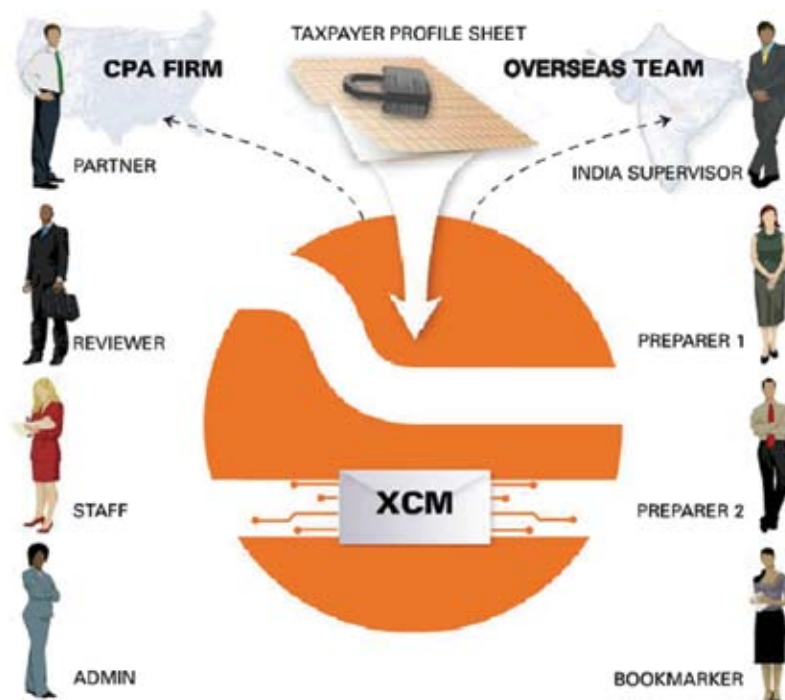


## Process Control.

Xpitax developed and utilizes the award-winning XCM™ workflow automation software to provide your firm with complete visibility into and control over your outsourced work. XCM was originally designed to facilitate collaboration between U.S. and overseas accountants to control the outsourcing process. It has since undergone significant development and serves as an important efficiency tool, enabling firms to effectively manage all of their in-house and outsourced work.

XCM enables your firm to gain efficiency and productivity increases by standardizing your workflow process and automating best practices for completing work. XCM manages all of your firm's workflows and enables you to easily maintain control over hundreds of client tasks at once.

XCM centralizes important task-related information and work management controls into a single, searchable firm-wide dashboard. This knowledge is necessary for resource management, client management, and workload management at the individual, partner, and firm administrator levels.



"I've found that I have more control over the work flow process while outsourcing my accounting work to Xpitax. With XCM, process control at the detail level is phenomenal because it serves as a central place for all the documentation and discussion points related to the project. We now scan and send almost everything through Xpitax. Partnering with Xpitax has definitely been one of the best business decisions I've made on behalf of Behind the Scenes."

– Jessica Reagan Salzman,  
Founder,  
Behind the Scenes LLC

Outsourcing = People + Process + Deliverables

## Proactive Service and Support.

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Xpitax delivers hands-on service and support to guide firms in ensuring a high quality end product for your clients. We understand your time is valuable. That's why setup and training is fast and thorough.

We pride ourselves on responsive, professional support, combined with additional opportunities such as our Annual User Conference, to help you make the most of your outsourcing investment.

## Technology Requirements.

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Scanner, and high-speed Internet connection

## Xpitax, LLC

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Founded by CPAs with over 75 years of experience in public accounting, Xpitax, LLC is the leader in delivering outsourcing solutions for the accounting profession.

Xpitax has developed and refined our services with accountants guiding the process every step of the way, ensuring unsurpassed security and flexibility, as well as a dedicated team approach. Xpitax utilizes the latest technologies available, including the XCM™ workflow and information automation software — specifically developed to address collaboration between U.S.-based professionals and their overseas counterparts.

Xpitax Solutions Private Limited, based in Chennai, India, was incorporated by Xpitax, LLC to give the company more flexibility for international growth through our India offices. Xpitax's India-based staff is comprised of chartered accountants and accountants focusing on the U.S. and Canadian tax and accounting industry.

**Contact us today**  
to make Xpitax part of your growth strategy.

Xpitax's outsourcing clients both large and small — from sole practitioners to large, multi-office firms with regional and national footprints — have realized benefits that go beyond simply solving an in-house resource issue, including:

- Greater growth capacity without additional overhead
- Improved life/work balance for employees
- Increased efficiency through a digital process
- Better retention by giving first year staff higher value work
- Enhanced client satisfaction from professionals with more time for higher value, personalized service

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