



Designing a Scalable CAS Practice

June 2, 2026

Founders



Christine Triantos

Owner and Founder

A seasoned workshop facilitator and a recognized expert in establishing and optimizing outsourced accounting practices. With 30 years of experience in the finance and accounting industry, Christine has successfully guided numerous organizations through the process of transitioning to outsourced accounting solutions. She was the West Regional CAS Partner at a Top 10 Firm and managed the National CAS technology team.



Deneen Dias

Owner and Founder

Deneen began her journey in Client Advisory Services (CAS) in 2009 with CPA.com where she helped hundreds of firms strategize and expand their CAS offerings. Her approach centers on a holistic focus: People, Process, Platform and Pricing. By aligning these elements with a commitment to advisory services, Deneen has demonstrated how firms can leverage CAS to drive significant revenue growth.



Michelle Welch

Owner and Founder

Michelle began her career in 2000 and has over 23 years of accounting experience. She is a CAS leader with expertise in GAAP, tax, and risk mitigation, known for building and scaling outsourced accounting programs. Michelle combines financial expertise with process and technology optimization to drive efficiency and growth, and is a skilled trainer who simplifies complex accounting into practical guidance.



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What We're Seeing in the Accounting Profession

The Pivot to Advisory: Why CAS is the Future



The Traditional Firm
Model is Evolving



Why Firms are Pivoting
to Advisory (CAS)



CAS is a Different
Business Model



The Evolution and Opportunity of CAS

The CAS Landscape: A Paradigm Shift

- **Build for Tomorrow, Not Today**
- **The "Interpreter" / Advisor Role:** Businesses need professionals who can translate financial data into actionable strategies.
- **Terminology Evolution:** The industry has progressed to Client Advisory Services to reflect this expanded scope.

How is CAS Different from Write-Up?

	Bookkeeping	Client Advisory Services (CAS)
		Services including in bookkeeping plus:
Purpose	Record historical financial transactions, primarily for tax return purposes	Provide forward-looking financial insights and strategic advice
Primary Focus	Accuracy and compliance in data entry	Analysis, planning, and decision support. Client support
Scope of Work	Bank and credit card reconciliations, AP/AR, Payroll processing, Journal entries	Monthly financials. Cash flow forecasting - Budgeting & KPIs - Financial modeling - Strategic planning. Monthly meetings
Decision-Making Role	Minimal; supports compliance and reporting	High; helps clients make informed business decisions. Support strategic decisions
Tools Used	Basic accounting software (e.g., QuickBooks, Xero). Manual	May include dashboards, analytics tools, forecasting software. Monthly deliverable. ERP systems, integrations. 3rd-party applications (tech stack)
Value to Client	Transactional support; ensures clean books. Limited	Strategic guidance; improves business outcomes
Frequency	Random, routine, recurring (weekly, monthly, quarterly, annually)	Monthly or project-based (depends on service level)
Level of Expertise	Entry to mid-level accounting skills	Advanced financial knowledge and advisory skills
Client Relationship	Tactical/vendor-like	Strategic/partner-like
Pricing Model	Typically fixed-fee or hourly (lower hourly rates)	Fixed Fee or tiered advisory packages (higher rates)

How We Define CAS

Client Advisory Services

- Monthly Accounting Services
- Services billed in advance, monthly (preferably fixed fee)
 - Billed as a separate service line, not lumped with tax or other fees
- Highly leveraged with technology, all cloud based
- Monthly deliverable (Financial packet, KPI's, dashboards)
- Standardized processes and procedures
- Industry niches, allows for expert level of services
- Advisory services (trusted advisor, CFO level services, strategic/planning consulting services)



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Hurdles & Barriers

CAS Hurdles

- Mindset Shift
- Defining CAS Service Offerings
- Talent Pool is Small
- CAS Specific Training/Upskilling Hard to Find
- CAS Tech is New and Different
- Marketing Resources
- Engagement Letters Were Created From Tax & Audit Templates



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Mindset Shift Towards CAS

Mindset Shift in Traditional Firms & Practices

Key CAS Differentiators for a Tax Practice



- **Business Plan/Practice Model**
 - Scalability
 - Onboarding / # of Clients
- **Compliance to Advisory**
 - Upskilling/Training Needed for CAS Professionals
 - Client relationship team members (same or different)
- **Quality Control**
 - Monthly vs. Annually
 - Guardrails
- **Team**
 - Broad skillset
- **Broad Technology Stack**
 - Internal I/T Teams
 - Tech Changes Often
- **Barriers to Entry**
 - Does your Firm know what these are?
 - Is the Firm sticking to them?



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Tax Practices Positioned for CAS

Integrating CAS into Tax Practices

Enhancing Tax Practices

A Natural Evolution for Tax Firms

- Firms are integrating CAS as a complementary service, enhancing their core tax offerings.
- CAS builds upon established client relationships and trust, extending support beyond the tax return.
- Provides clients with crucial visibility and guidance throughout the year, moving beyond a compliance-focused model.



Enhancing Tax Practices

Key Benefits of Integrating CAS:

- **Enhanced Client Relationships:** Deeper engagement through continuous support and decision-making assistance.
- **Increased Revenue & Efficiency:**
 - Higher revenue per client through recurring CAS services (e.g., monthly close, reporting).
 - More efficient and strategic tax work due to accurate, timely financials.
 - Smoother, more consistent revenue streams, reducing seasonality.
- **Meeting Evolving Client Expectations:** Addressing the growing demand from business owners for proactive financial guidance and strategic advice.

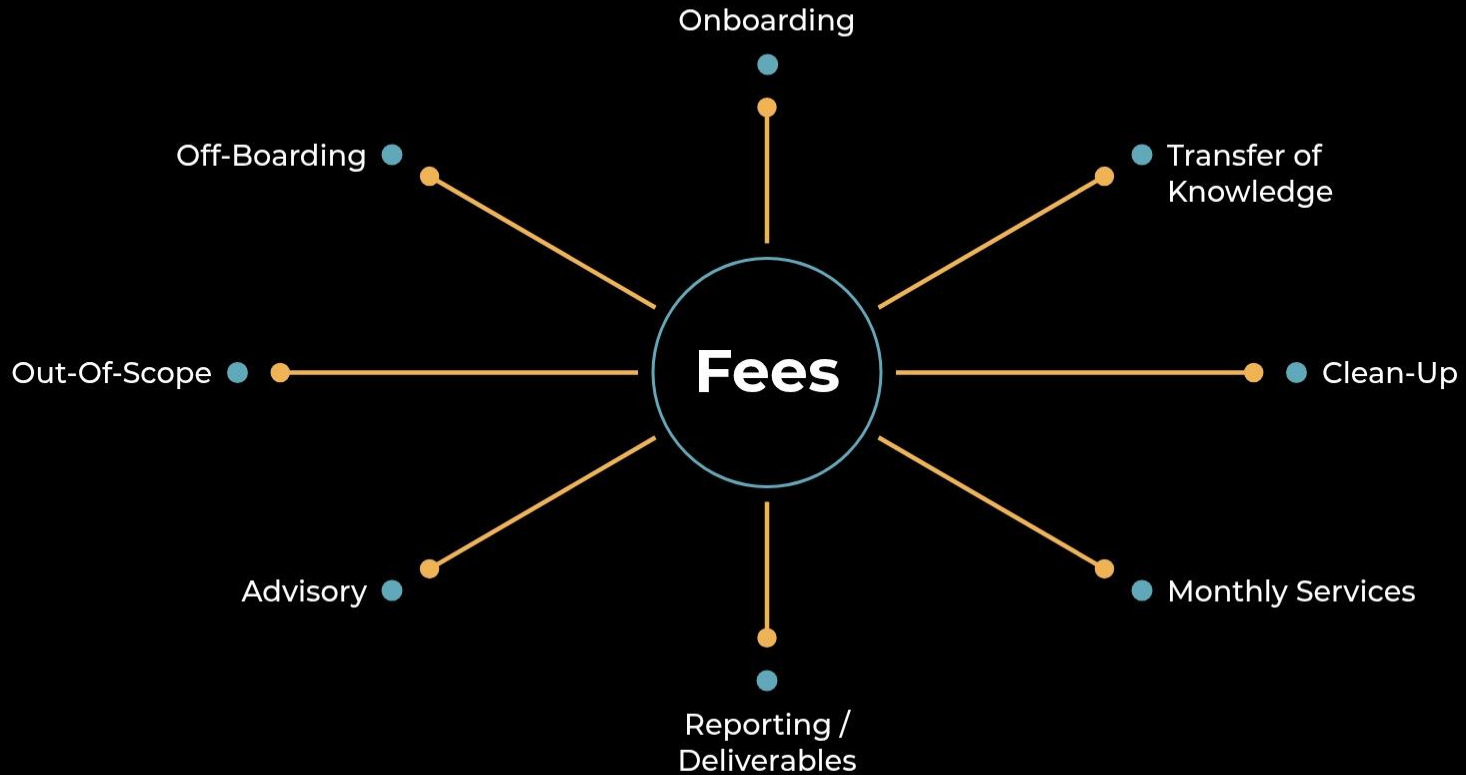


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CAS Revenue Streams

CAS Fee Buckets





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Mitigating Risk



Mitigating Risk in CAS

- Inadequate Standard Engagement Letters
- Data Access Risks
- Scope Protection

Prospect Analysis: Ensuring Robust Risk Management

Key considerations before engaging a new client for successful partnerships.



Client's Business Understanding



Financial Health Assessment



Compliance and Regulatory Standing



Alignment of Goals and Values



Scope of Work Clarity



Building a Scalable CAS Model

Scalability starts with intentional design, not by forcing what you already have into a new model

This is not about trying to make your current setup fit, it's about designing the model you want, and then building the structure to support it.

For new clients, scalability means knowing exactly how many you can onboard per month and per quarter without sacrificing quality or client experience.

Vision First, Resources Second

Recap



- **You have a definition of CAS**
- **You understand the hurdles & barriers**
- **You've considered the mindset shift to CAS**
- **You understand how to enhance your Tax practice with CAS**
- **You have an understanding of the possible revenue streams**
- **You understand the need to mitigate risk with CAS**



Take advantage of this \$200 discount before 6/30/2026 and get the tools, frameworks, and guidance to accelerate your CAS journey.



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