

CPA Undergoes a Multi-Million Dollar Journey



Revolutionizing the CPA Industry

The Patton Archer Corporation empowers CPA firms with outsourced investment management and valuation services. Through our comprehensive back office support, we enable community practitioners to elevate their services and substantially grow their business.

Stagnant Growth and Missed Opportunities

A CPA practitioner who previously held licenses with one of our competitors allowed them to lapse due to a lack of effective marketing. Despite passing the Series 65 exam, he found himself unable to attract new clients in the investment advisory sector, and his CPA firm was not growing at the desired rate.



Comprehensive Back Office Support and Marketing

Our unique value proposition made all the difference. The Patton Archer Corporation served as the complete back office for our client. We handled paperwork, account transfers, and even put together an easy-to-follow marketing plan, free of any monthly or annual fees. Our approach enabled the practitioner to focus on what they do best—serving their customers.



Doubling the Accounting Practice and Ongoing Success

Our partnership led to transformative results. The CPA firm not only doubled in size, but the practitioner now enjoys a residual income of nearly \$200,000 per year. They continue to be a satisfied client, utilizing our Investment Management and Valuation Services to further benefit their own clients.



Having a true back office who does all the paperwork, billing, investment management, rebalancing is a difference maker. **Now we can focus on client relationships and have gone from \$4 million to \$80 million since joining the Patton Archer Corporation team.**

- A Valued Partner