

HOW AN HVAC AND PLUMBING SERVICES COMPANY GAINED FINANCIAL CONFIDENCE TO SUPPORT ACQUISITIONS AND MULTI-ENTITY GROWTH

Replacing unreliable bookkeeping with a scalable outsourced accounting team

5

Entities Managed
Under One
Accounting Platform

1

Successful
Plumbing Company
Acquisition



Improved Financial
Accuracy & Reporting
Confidence



Streamlined
Multi-Company
Cash Flow Visibility

1. ABOUT THE CLIENT

The client is a provider of HVAC and plumbing services operating across multiple business entities. As the organization expanded through growth and acquisitions, leadership required a reliable accounting infrastructure capable of managing financial operations across several interconnected companies.

**UNRELIABLE BOOKKEEPING
AND LIMITED EXPERTISE
OBSCURED MULTI-ENTITY
FINANCIAL VISIBILITY**

2. THE CHALLENGE

- Persistent bookkeeping errors causing operational frustration
- Lack of true accounting expertise from prior provider
- Unexpected departure of internal accounting staff
- Limited visibility across multiple companies' financial performance
- Need for scalable financial systems to support acquisitions

3. THE SOLUTION

- 1** ↓ Dedicated outsourced accounting team with accounting expertise
- 2** ↓ Implementation of reliable financial reporting processes
- 3** ↓ Multi-entity accounting structure to support business expansion
- 4** ↓ Assistance with financial transition during acquisition of a plumbing company
- 5** ↓ Technology integration support to align operational systems
- 6** ↓ Ongoing cash flow visibility across multiple companies

"HIRING A TEAM SEEMS BETTER THAN JUST HIRING AN INDIVIDUAL."

— CEO, HVAC & Plumbing Services Client

RESULTS & IMPACT

- ✓ Improved accuracy and confidence in financial reporting
- ✓ Smooth financial transition during business acquisition
- ✓ Unified financial oversight across five related entities
- ✓ Leadership empowered with clearer cash flow visibility

BEFORE

- Continuous bookkeeping errors
- Limited accounting expertise
- Unreliable financial systems
- Leadership managing financial uncertainty

AFTER

- Reliable outsourced accounting team
- Accurate financial reporting
- Integrated system across multiple businesses
- Clear financial visibility for strategic decisions

KEY TAKEAWAYS

- ✓ A team-based outsourced model provides broader expertise
- ✓ Scalable accounting systems support acquisitions and expansion
- ✓ Multi-entity financial visibility strengthens leadership decision-making

PROJECT SNAPSHOT

INDUSTRY: HVAC & Plumbing Services

SERVICES PROVIDED: Outsourced Accounting & Multi-Entity Financial Management

DURATION: Ongoing Partnership Since 2014

PRIMARY GOALS: Financial accuracy, acquisition support, and multi-company oversight

**LOOKING TO ELIMINATE
BOOKKEEPING HEADACHES
AND PREPARE FOR
SCALABLE GROWTH?**

**CONNECT
WITH US**

