NEXACC

The firm partnership guide

Guide - The whole model in one document: the five engagement types, what stays with your firm, the client-protection terms and how pricing is structured.

For accounting, tax, bookkeeping, payroll and medical billing firms

Engagement models

01 White-label back office - Your brand, start to finish

Fits: Firms who want capacity that never appears in front of the client

We work inside your systems, under your engagement letter, in your file-naming and workpaper conventions. Deliverables leave in your template with your firm's name on them.

- Monthly close, reconciliations and workpapers in your format
- Your ledger, your document portal, your review checklist
- No NEXACC branding, signatures or client-facing contact
- One named lead accountant plus a reviewer on every file

02 Overflow & seasonal capacity - Scoped block, fixed window

Fits: Firms hitting a wall in January-April or after a block of new wins

A defined block of hours or a defined list of client files for a defined window. You keep the relationship and the review; we absorb the volume so you stop turning work away.

- Catch-up and clean-up engagements, oldest period first
- 1099 and year-end prep packages, ready for your reviewer
- Bank, card, loan and payroll reconciliations at volume
- Ramp up and ramp down without hiring or laying anyone off

03 Dedicated pod (staff augmentation) - Your team, extended

Fits: Firms who need a consistent team, not a rotating queue

The same accountants every month, trained on your standards once and kept on your book of business. They join your stand-ups and use your task board if you want them to.

- Named accountants with a documented backup for each seat
- Your close calendar, your review notes, your KPIs
- Direct channel in your Slack, Teams or practice-management tool
- Quarterly capacity review so the pod tracks your growth

04 Specialty desks - New revenue line, no new hires

Fits: Firms whose clients need work outside the firm's own lane

Keep the client, add the service line. We run the specialist work your firm does not want to staff for, and it bills through you.

- Medical billing and revenue cycle for healthcare clients
- Provider credentialing and payer enrollment
- Multi-state payroll, registrations and sales-tax nexus
- Financial models, lender packages and 13-week cash forecasts

05 Referral & hand-back - Referred out, not lost

Fits: Firms who would rather refer a file out than carry it

Work you do not want - small monthly bookkeeping, messy pre-cleanup, a service line you have retired - goes to us with a written hand-back path if the client grows into your ideal profile again.

- Written scope of what we do and do not touch
- Quarterly status back to you, in writing
- Hand-back on request, with a full file and no exit fee
- No cross-selling of your retained services, ever

What stays with your firm

We do not sign returns and we are not a licensed CPA firm

Attest work, audits, reviews, compilations under an AICPA standard and signed tax returns stay with your firm. That is a structural limit on our side, not a policy we could quietly change - it is the reason a partnership with us cannot turn into a competitor.

Mutual non-solicitation, in writing, before any file moves

Our partner agreement includes a mutual non-solicitation and non-circumvention clause covering your clients and your staff, for the term plus 24 months. It is signed before we see a single ledger.

We never contact your clients unless you put us in the room

No emails, no calls, no newsletters, no ad targeting. Your client list is never loaded into our marketing systems. When client contact helps, it happens on your invitation, under your name, with you copied.

Your data is segregated and access is least-privilege

Each partner firm gets its own workspace, its own credential store and its own access list. Access is granted per file, logged, and revoked on offboarding within one business day. Where protected health information is involved, we sign a BAA first.

You own the file, always

Ask for the workpapers and you get them - complete, current and in a portable format, at any point in the relationship, with no exit fee and no hostage period.

What you can hand over

Monthly close

- Bank, credit card, loan and merchant reconciliations
- AP and AR management, aging clean-up
- Accruals, prepaids, fixed-asset and depreciation schedules
- Multi-entity and intercompany eliminations
- Close package with tie-out workpapers in your template

Clean-up & catch-up

- Multi-year rebuilds from statements and source documents
- Chart-of-accounts rationalisation and historical remapping
- Opening balance proof and prior-year tie-out

- Documented issues log for your reviewer, not a silent fix

Payroll & compliance

- Multi-state payroll processing and filings
- State registrations, withholding and unemployment accounts
- Sales-tax nexus tracking and filings
- 1099 collection, validation and filing

Healthcare revenue cycle

- Charge entry, claim submission and clearinghouse management
- Denial work, appeals and AR follow-up by payer
- Payment posting and reconciliation to the ledger
- Provider credentialing and payer enrollment

Advisory support

- 13-week cash forecasts and driver-based models
- Lender and investor reporting packages
- Budget-to-actual reporting with written variance notes
- Board and management reporting built to your house style

How a partnership starts

01 Fit call - 30 minutes

What is backing up, which client profiles you would hand over, what has to stay in-house. If we are not the right bench for it, we say so on that call.

02 Paper before data

Mutual NDA, non-solicitation and non-circumvention, data-processing terms and - where PHI is in scope - a BAA. Nothing moves until it is signed.

03 Pilot on two to three files

A paid pilot on real clients with a written scope, a close calendar and a defined review checkpoint. You judge us on delivered workpapers, not on a deck.

04 Scale on your calendar

Roll on additional files or seats at the pace you choose. Capacity is reviewed quarterly against your pipeline so busy season is planned, not survived.

Engagement patterns

Composite, anonymised illustrations of how partner engagements are scoped, staffed and measured. Figures describe the agreed scope and targets, not audited results or a promised outcome. Partner references are shared on request, with the referring firm's permission.

A 12-person tax practice, Southwest - Overflow & seasonal capacity

Preparation work stacked up from mid-February, partners were preparing rather than reviewing, and the firm had started declining new business returns it would normally win.

Files in the block: 140 | Partner hours returned: ~380 | Turnaround target: 5 business days | Client contact from us: 0

The partners spent the season reviewing and selling instead of preparing, and the firm stopped turning business returns away mid-season.

A bookkeeping firm, Mountain West - Dedicated pod

Growth was capped by hiring. Every new client meant recruiting, and the owner was absorbing close work personally whenever someone left.

Files on the pod: 24 | Close calendar: Business day 5 | Owner hours returned: ~60/month | New hires required: 0

The firm took on new clients on its own timeline instead of waiting on recruitment, and the owner moved back to review and advisory.

A CPA firm with a healthcare book, Southeast - Specialty desk

Clients kept asking for revenue-cycle help. Referring them to a billing company risked handing over the relationship, and building the desk in-house was not worth the hiring.

New service line: 1 | Clean-claim target: 95%+ | Denial follow-up: Within 5 days | Client relationship: Retained

The firm answered a client request it used to refer out, and kept the whole relationship - including the tax and advisory work attached to it.

Questions firms ask

Are you going to compete with us for our clients?

No, and the agreement makes it enforceable. Our partner terms include mutual non-solicitation and non-circumvention covering your clients and staff for the term plus 24 months. We never market to a partner's client list, and we are not a licensed CPA firm - we cannot sign returns or issue attest reports, so the work that anchors your client relationship is structurally not ours to take.

Whose brand does the work go out under?

Yours, in the white-label and pod models. We work inside your systems, your templates and your file conventions, and deliverables carry your firm's name. Nothing leaves with NEXACC branding unless you ask for a co-branded arrangement.

Who reviews the work before it reaches the client?

Every file gets a preparer and a second-set-of-eyes reviewer on our side before it reaches you, and your reviewer signs off before it reaches the client. We do not bypass your review chain.

How do you protect our client data?

Each partner firm sits in its own workspace with its own credential store and access list. Access is least-privilege and granted per file, activity is logged, and access is revoked within one business day of offboarding. Where protected health information is in scope we sign a BAA before any data moves.

What does it cost?

Three structures: a fixed monthly fee per client file for recurring work, a monthly seat rate for a dedicated pod, and a scoped fixed fee for a defined overflow or clean-up block. Every engagement is priced in writing before work starts, so you can set your own margin on top with certainty.

What if a pilot does not work out?

The pilot ends and you take the files back - complete workpapers, current status, portable format, no exit fee and no notice period beyond the pilot's own window.

Can you work in our software?

Yes. We work in the client's or your ledger, document portal and practice-management stack rather than forcing a migration. If you want a platform recommendation we will give one, but changing systems is never a condition of the partnership.

How quickly can you take on volume?

A pilot on two to three files typically starts within two weeks of signed paper. Larger blocks and dedicated pods are staffed against a written start date agreed on the fit call.

Talk it through

A 30-minute fit call, no deck: what is backing up, which client profiles you would hand over, and what a pilot on two or three files would cost.

Book a fit call: https://www.nexacc.com/schedule

info@nexacc.com - +1 (443) 739-9197 - www.nexacc.com/partners