

Jona

One of the
RSM team



Improve your business process integration

Finance and accounting outsourcing buyer's guide



CONTENTS

1

Introduction

2

Empowering financial transformation

3

Fueling agility and financial excellence

4

RSM Catamaran



Outdated back-office processes can hinder your business, causing inefficiencies, increased risks and higher costs.

Tackling these challenges head-on allows you to unlock the potential of your administrative functions and better support overarching business strategies.

Whether it's finance, accounting or other critical areas, recognizing signs of inefficiencies—such as over-reliance on manual work, data inaccuracies or compliance challenges—can be the first step toward transformation. But it can be challenging to know where to start.

That's where outsourcing comes in—outsourcing means you have a strategic advisor who will work with you to modernize these functions so your business can reduce bottlenecks, promote operational accuracy and access real-time insights that enhance decision making and growth opportunities.

WHY OUTSOURCE?

Providers can bring in experience and tools to assess business problems, prioritize focus areas based on business goals, solve for the most immediate pain points, and then provide ongoing services and guidance as your organization evolves.

Empowering financial transformation

In today's dynamic business environment, financial, accounting and tax processes must evolve into strategic enablers. Modernizing these functions alongside managed IT and human resources outsourcing is crucial for achieving efficiency, agility and deep insights. RSM's finance, accounting and outsourcing services transform traditional roles, shifting the focus from manual tasks to strategic thinking. By integrating cutting-edge tools, businesses achieve seamless continuity, optimized processes and robust risk management, helping to ensure compliance and enhancing decision making with timely insights.

Outsourcing the back office empowers businesses to focus on their core strengths, driving innovation and growth. RSM's scalable, tech-enabled solutions support both current operations and future expansion, reducing operational costs while adapting to market changes. This strategic approach not only maintains competitiveness but also fosters a forward-thinking mindset; this in turn enables businesses to thrive in a demanding environment. By entrusting RSM with back-office outsourcing services, organizations gain flexibility and resilience, reinforcing their strategic advantage in the marketplace.

READY TO TAKE THE NEXT STEP?
Check out our finance and accounting outsourcing services

RSM finance and accounting outsourcing



Leverage experienced advisors for regulatory compliance, risk mitigation and strategic financial planning support



Optimize costs by streamlining processes and minimizing in-house resource reliance



Gain real-time insights to enable faster decisions and strategic business choices



Enable continuity by consolidating vendors and integrating tools

Revamping nonprofit efficiency with comprehensive managed service solutions

CLIENT

Student Veterans of America (SVA), a nationwide nonprofit that supports military veterans as they transition into higher education

[READ THE FULL CASE STUDY](#)

THE CHALLENGE

SVA struggled to balance operational efficiency with rising costs while staying focused on its core mission.

THE SOLUTION

SVA hired RSM to manage its accounting and IT functions, which enabled SVA to save money, streamline operations and focus on other priorities. RSM's 24/7 IT support and advanced cybersecurity measures also improved SVA's ability to protect sensitive data and ensure compliance. Because of RSM Catamaran—RSM's suite of outsourced solutions and managed services—SVA can better focus on what truly matters to the organization while ensuring operational tasks are handled efficiently and effectively.

1

2

3

4



Fueling agility and financial excellence

Addressing the challenges faced by modern finance functions, RSM's finance and accounting outsourcing offers a comprehensive, dynamic solution that promotes operational efficiency, empowers decision making and drives financial performance—all while reducing costs and risks.

READY TO TAKE THE NEXT STEP?
Check out our finance and accounting outsourcing services

RSM finance and accounting outsourcing



Access a team of highly skilled professionals with deep financial leadership, advanced technical accounting knowledge and operational experience.



Reduce the risk of disruption caused by turnover or staffing shortages by relying on a scalable service model designed to adapt to your evolving business needs



Enhance accuracy and visibility with cloud-based, real-time reporting tools, providing powerful insights through user-friendly dashboard interfaces.



Achieve cost optimization and flexibility by leveraging fractional resources and offshore capabilities, eliminating the expense of maintaining a full-time in-house finance team.



Streamline key processes such as SEC reporting, revenue recognition, fixed asset accounting and equity administration, ensuring compliance and efficiency.

Financial resilience through outsourcing with the Shadowserver Foundation

CLIENT

The Shadowserver Foundation, a leading nonprofit in internet security

[READ THE FULL CASE STUDY](#)

THE CHALLENGE

Shadowserver faced critical financial and operational challenges due to outdated manual bookkeeping and dependence on a single person for financial management. This led to accounting errors and a temporary revocation of their nonprofit status.

THE SOLUTION

RSM stepped in to implement a finance and accounting outsourcing solution, revising financial statements, refiling tax returns and establishing a sustainable back-office structure. This approach restored their nonprofit status and automated financial processes, providing timely insights and improving reporting accuracy. RSM's intervention strengthened Shadowserver's financial foundation, allowing them to focus on their core mission of enhancing internet security.

1

2

3

4



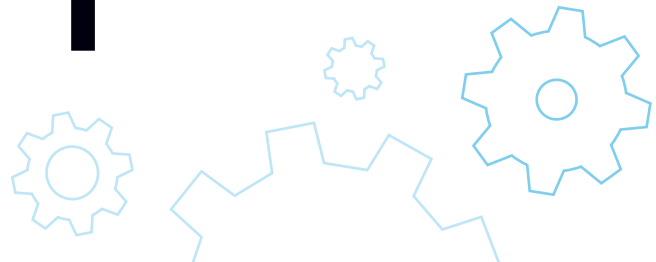


RSM Catamaran

Outsourced solutions that keep your business moving forward

RSM Catamaran—our suite of integrated, outsourced solutions—has the power to transform and strategically evolve your finance, accounting, tax, IT, risk, security and human resources functions for the future. We add value without adding overhead costs by giving you access to a deep knowledge base and cutting-edge technology. Whether we are mitigating risk or managing your infrastructure, the positive impact can be felt throughout your business.

READY TO TAKE THE NEXT STEP?
Check out our finance and accounting outsourcing services



We offer a wide range of solutions tailored to your organization's specific needs and priorities:

› **Business and technology advisory:**

We partner with you by beginning with a tailored assessment that aligns with your business strategy and goals, ensuring flexibility and support to overcome constraints.

› **Comprehensive consulting and outsourcing:**

Our diverse range of solutions are crafted to meet your current and future needs, offering agility and a team mentality to sustain success.

› **Industry-specific insights:**

With years of experience, we provide proprietary solutions that are customized to your sector. Our goal is to become an integral part of your team and to deliver enhanced value.



RSM Catamaran

FINANCE AND ACCOUNTING OUTSOURCING

- Achieve cost savings and flexibility through fractional resources and offshore capabilities, tailored to meet your organization's unique financial requirements.
- Access a team with extensive financial leadership and technical accounting experience, providing exceptional guidance and insights for your business needs.
- Enhance reporting efficiency by implementing specialized technology stacks that deliver real-time insights, significantly improving financial performance and assessment.
- Minimize operational disruption and improve predictability in finance operations with scalable, adaptable solutions designed to support organizational growth and stability.

STRATEGIC FINANCE AND FINANCIAL PLANNING

- Gain strategic insights through sophisticated financial modeling, empowering informed decision making and supporting sustainable growth strategies across your business.
- Optimize capital structures and enhance financial outcomes using customized planning and analysis, tailored to your specific organizational needs and goals.
- Achieve transparency in financial performance with ongoing support for financial planning and analysis, utilizing advanced data visualization techniques to provide clear, actionable insights.
- Leverage comprehensive advisory services for mergers, acquisitions and other strategic initiatives, ensuring informed planning and successful execution of business strategies.

TAX OUTSOURCING

- Transform your tax function with scalable solutions that adapt to evolving regulatory landscapes, helping to ensure compliance and efficiency in business processes.
- Gain specialized tax advice without the ongoing financial burden of maintaining full-time staff, optimizing your tax operations and resource allocation as well as identification of tax credits and incentives.
- Utilize advanced technology platforms to streamline tax compliance, enhancing reporting accuracy and reliability for improved financial oversight.
- Achieve cost efficiency through outsourcing tax operations, focusing resources on strategic business priorities and core competencies to drive growth.

READY TO TAKE THE NEXT STEP? [Check out our finance and accounting outsourcing services](#)

1

2

3

4



RSM Catamaran

PRIVATE EQUITY FUND ADMINISTRATION AND ADVISORY

- Benefit from integrated fund management solutions designed to enhance operational efficiency and facilitate compliance with complex regulatory requirements.
- Easily access data and insights, empowering swift, informed decisions on investment opportunities and strategic fund management.
- Optimize fund administration with advanced technology, enabling seamless investor reporting and efficient management of operational challenges.
- Leverage technical advisory services to address regulatory and operational complexities, enhancing the effectiveness of private equity fund strategies.

IT MANAGED SERVICES

- Support core operations with reliable IT infrastructure, enhancing business agility and operational efficiency through tailored IT solutions.
- Improve data security and system reliability with robust IT management and advanced cybersecurity measures, customized to meet your needs.
- Streamline IT processes to support seamless business functions, reducing operational risks and enhancing overall productivity and efficiency.
- Collaborate with a dedicated IT team that adapts to your technological requirements and long-term growth plans, ensuring continuous innovation.

TECHNOLOGY RISK CONSULTING

- Identify IT risks internally as well as risks related to third-party vendors and service providers.
- Build a long-term plan to monitor and mitigate your IT risks based on your environment.
- Evaluate and measure your IT risks, including areas such as cloud risk, emerging technology risk and digital strategy risk.
- Minimize audit fatigue and create efficiencies with a common control library for various regulations that allow you to test once and use thereafter.

READY TO TAKE THE NEXT STEP? Check out our finance and accounting outsourcing services

1

2

3

4



BUSINESS RISK CONSULTING

- Identify opportunities to streamline and cut costs—everything from using your financial software package more effectively to eliminating redundant procedures.
- Monitor key areas and give high-quality assurance to the board that IT risks are being monitored effectively and objectively.
- Take advantage of flexible methodology, proven processes and advanced technology to mitigate risk, monitor compliance and add value.
- Accelerate your success by giving stakeholders the confidence to make critical business decisions and stay in control, no matter where the organization is heading.

READY TO TAKE THE NEXT STEP?

Check out our [finance and accounting outsourcing services](#)

INTEGRATED HR AND PAYROLL OUTSOURCING SOLUTIONS

- Drive operational excellence with tailored HR outsourcing solutions, seamlessly integrating strategic support and streamlining daily processes to align with your organization's long-term objectives.
- Facilitate compliance and mitigate risk through management of payroll, tax regulations and audits, leveraging industry knowledge to maintain accuracy and adherence to evolving standards.
- Strengthen employee engagement and retention by optimizing talent management practices, including hiring, onboarding, benefit administration and performance management, fostering a thriving workplace culture.
- Scale effortlessly with adaptable HR services designed to meet changing business needs, providing the flexibility necessary to support sustained growth and operational agility.



Elevate your back-office operations for lasting growth

Inefficient financial processes can hinder progress and create unnecessary barriers. Finance and accounting outsourcing offers a modern, strategic approach to streamline operations, minimize manual workflows and enhance overall accuracy. By leveraging advanced tools and data-driven insights, finance and accounting outsourcing empowers businesses to make smarter decisions, reduce operational delays and focus on core objectives. Tailored to align with your unique goals, this service offering promotes agility and opens new opportunities to drive growth and innovation in a constantly changing marketplace.

Looking to transform your financial functions? [Explore how FAO can unlock efficiency and elevate your business to new heights.](#)

+1 800 274 3978
rsmus.com

This document contains general information, may be based on authorities that are subject to change, and is not a substitute for professional advice or services. This document does not constitute assurance, tax, consulting, business, financial, investment, legal or other professional advice, and you should consult a qualified professional advisor before taking any action based on the information herein. RSM US LLP, its affiliates and related entities are not responsible for any loss resulting from or relating to reliance on this document by any person. Internal Revenue Service rules require us to inform you that this communication may be deemed a solicitation to provide tax services. This communication is being sent to individuals who have subscribed to receive it or who we believe would have an interest in the topics discussed.

RSM US LLP is a limited liability partnership and the U.S. member firm of RSM International, a global network of independent assurance, tax and consulting firms. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party. Visit rsmus.com/aboutus for more information regarding RSM US LLP and RSM International.

RSM, the RSM logo and *the power of being understood* are registered trademarks of RSM International Association.

© 2025 RSM US LLP. All Rights Reserved.