

A Specialty Services Bench for CPA Firms

At CSH, we believe the best client outcomes happen when trusted advisors work together. As a firm with deep specialty capabilities, we partner with CPA firms to support clients whose needs extend beyond their in-house tax and accounting services.

This guide is designed as a practical opportunity-spotting resource, helping you identify situations where your clients may benefit from additional solutions that many firms often don't have in-house. When those needs arise, CSH steps in as an extension of your team, not a replacement.

Our role is simple:

- ⦿ You remain the primary client relationship owner
- ⦿ We deliver the specialty expertise
- ⦿ We collaborate transparently and respectfully



For referred engagements, we reinforce alignment and mutual value while ensuring your client receives the highest level of service. Use this guide to recognize common triggers, ask the right qualifying questions, and confidently introduce CSH when advanced expertise can create better outcomes for your clients.

	Solution	Triggers	Qualifying Questions
TAX SERVICES	State & Local Tax (SALT)	<ul style="list-style-type: none"> • Multi-state operations • Remote employees • Unclear state tax compliance 	Are you operating in or selling to multiple states with varying tax laws?
	Cost Segregation & Green Energy Incentives	<ul style="list-style-type: none"> • New building construction • Building acquisitions and remodels • Installation of solar, geothermal or green tech 	Have you recently constructed, purchased, or renovated any buildings? Any plans for energy-efficient upgrades?
	Controversy	<ul style="list-style-type: none"> • IRS Compliance Matters 	Have you had any contact with tax authorities or concerns about IRS issues?
	R&D Credits	<ul style="list-style-type: none"> • New products • Custom products • Software development 	Is your company investing in product development, engineering, or software innovation?
	Nexus Analysis	<ul style="list-style-type: none"> • New customers in new states • Inventory in states • New employees in different states 	Have you recently added customers, employees, or inventory in new states? Do you have customers in states where you don't file income tax returns or sales tax returns?
	Solution	Triggers	Qualifying Questions
ADVISORY SERVICES	SOC & CMMC Compliance	<ul style="list-style-type: none"> • Government contractor/subcontractor, or working with primes • Customer/vendor requests for SOC report and/or CMMC • Handling sensitive data (CUI, customer financial data, PHI/PII) • Contract renewals/bids, growth into regulated markets, or upcoming transaction/financing 	Are customers/partners requiring a SOC report or CMMC compliance to keep/win work? Do you store, process, or transmit CUI or other sensitive customer data? Are cybersecurity or control requirements slowing down sales, renewals, or vendor onboarding?
	Quality of Earnings (QoE)	<ul style="list-style-type: none"> • Acquiring or selling a business or investment • Considering ownership transition of a business 	Are you considering a business acquisition, sale, or investment? What is the plan for the business after you retire? Is your business in shape to sell?
	Transaction Structuring	<ul style="list-style-type: none"> • Transaction/Deal in progress with needs to finalize structure 	Have you considered all the tax implications of the deal you are working on? Are your lawyers also tax experts?
	Qualified Plan Administration & Consulting (QPAC)	<ul style="list-style-type: none"> • The business has experienced recent growth, turnover in HR or finance, or changes to its retirement plan provider or structure. • Recent plan changes or upcoming acquisition/merger, IRS or DOL notices, failed discrimination testing, or employee complaints 	Do you anticipate any changes to your retirement plan due to growth, acquisitions, or organizational shifts?
	Forensic & Lit Support	<ul style="list-style-type: none"> • Suspected fraud, shareholder disputes, litigation, or internal investigations 	Have you encountered any disputes, fraud suspicions, or litigation that requires financial analysis?
	Business Valuation	<ul style="list-style-type: none"> • Ownership transition, litigation, estate planning, buy-sell agreements, or financing needs 	Have you had a formal valuation of your business completed recently?