

Audit Services Flow Chart

Introduction

Audits can be overwhelming. Our Audits are designed to let you tell us your practices, show us your documents, and let us do the heavy lifting.

We guide you through the Audit Questionnaire (if applicable), outlining steps for completion.

We inform you of the anticipated date for return of our recommendations as a result of the information you provide in the Questionnaire (usually 1-2 weeks out).

Your Action Items

Fill in responses to the Audit Questionnaire in Microsoft Word.

Attach any relevant documents, if applicable.

Email or call us with questions. No question is too small.

Return the completed Questionnaire and documents to us for review.

We Conduct the Audit & Provide a Summary of Findings with Recommendations

We review your Questionnaire responses and documents, flag any areas of compliance concern requiring attention, provide proposed recommendations and best practices, and document any questions and/or concerns.

Optional Closing Call

If you would like to schedule a call to walk through our recommendations, let us know!

You ask questions and we provide answers.

All protected by the Attorney-Client privilege.

Our Recommendations Will Conclude The Audit