



VASQUEZ  
+ COMPANY LLP

Clarity, Efficiency,  
Compliance, and Success.

Helping you focus on what  
matters most.





# Beyond Boundaries: Trusted Workforce Models for a Changing World



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# Tonette Santillan

## Audit Partner

### Partner at Vasquez + Company

- **Oversees audit, assurance, and consulting services** for private companies, regulated entities, and employee benefit plans.
- **Leads The Vasquez Advantage** in the Philippines, managing outsourcing operations that support the firm's audit, accounting, tax, and consulting service offerings.
- **Manages** the firm's quality control and risk management functions, ensuring compliance with professional standards and regulatory requirements.

### Distinguished Experience

- **Over 30 years of experience** in public accounting and private industry
- **Partner at Vasquez + Company LLP** in Los Angeles
- **Assurance Director at RSM US LLP** in Los Angeles
- **PwC's Financial Services audit practice** in both Los Angeles and the Philippines

### Professional Achievements

- **Founding Board Member ISFFA**
- **BSC in Accounting** and **MBA** from De La Salle University
- **CPA and CGMA**

# / ABOUT VASQUEZ + COMPANY

Vasquez + Company LLP was founded in Los Angeles over 55 years ago and has an unparalleled reputation for delivering superior accounting, audit, tax, and consulting services. We put your success first. Fresh strategies, improved efficiencies, and increased growth are the goals of our partnership with you.

## BY THE NUMBERS

# 55+

**YEARS IN SERVICE**

A full-service firm established in 1969, with more than 55 years of experience in accounting, audit, tax, and consulting services.

# 1%

**TOP 1% OF FIRMS RANKED**

Ranked among the Top 1% of accounting firms by the American Institute of Certified Public Accountants.

# 20,000+

**AUDITS SINCE 1969**

We have completed over 20,000 audits:

- 8,000 NPO Audits
- 3,000 Single Audits
- 2,000 Employee Benefit Plans
- 4,500 Government
- 2,000 Healthcare
- 2,500 Private

# 200+

**PROFESSIONALS**

Experienced resources of 200+ personnel. Average staff retention rate over 90% for the past two years. 75% are women.

# / CONNECTIONS

Vasquez's commitment to quality is reflected in our active participation in leading industry organizations and professional communities:

## LOCATIONS

8

Offices located in the  
US and the Philippines

- Los Angeles
- San Diego
- Sacramento
- Fresno
- Irvine
- Phoenix
- Las Vegas
- Philippines



# / SERVICES AND INDUSTRIES

## SERVICES

### Tax and Accounting

- Tax Compliance, Planning, and Consulting
- Finance and Accounting Outsourcing (FAO)
- NPO Governance and Policy Review

### Audit

- Financial Statement Audits
- FAR Compliance Audits
- Single Audits
- Forensic Audits
- Employee Benefit Plan Audits

### Outsourcing

- External & Internal Audit Support
- Accounting & Controllershship
- Technology Consulting & Assurance
- Tax Return Preparation

### Consulting

- SOX Compliance
- FAR Consulting
- M&A Services
- Other Business Consulting Services

## INDUSTRIES



Employee Benefit Plans



Government



FAR



Non-Profit  
Organizations



Healthcare and Federally Qualified  
Healthcare Centers (FQHCs)



Transportation



Water



Private  
Foundations



Privately Held  
Companies

# WORKFORCE MODELS AND OUTSOURCING SOLUTIONS

# / LEARNING OBJECTIVES

Upon completion of this session, participants will be able to:

Evaluate strategic workforce models and outsourcing solutions in response to CPA talent pipeline challenges, including assessing the value of global talent and determining organizational readiness for outsourcing initiatives.





# / CPA TALENT PIPELINE: CHALLENGES & OPPORTUNITIES

**According to U.S. Bureau of Labor Statistics:**

Employment of accountants and auditors is projected to grow **six percent** from 2023 to 2033, **faster than the average for all occupations.**

About **130,800 openings for accountants and auditors are projected each year**, on average, over the decade.

Many of those openings are expected to result from the need to replace workers who transfer to different occupations or exit the labor force, such as to retire.

Promising trends in enrollment and exam activity suggest progress, but we need to keep a close eye on CPA-ready and workforce-ready numbers amid strong demand.



# / KNOWING ABOUT STRATEGIC WORKFORCE MODELS

STRATEGY	DEFINITION	FOCUS	EXAMPLES
<b>Outsourcing</b>	Engaging an external organization to perform specific services. This enables cost savings and access to specialized skills.	Who performs the work.	BPO for tax season EOR for payroll Cloud platforms like CCH Project-based contracting for seasonal needs
<b>Offshoring</b>	Relocating business functions to another country to benefit from lower costs, favorable regulations, or tax advantages. Often used for scalable operations.	Where the work is done.	Specific service delivery executions with different locations (Philippines, India, etc.)
<b>Right-shoring</b>	Strategically selecting the best combination of location and delivery model to meet business goals. Focuses on balancing cost, control, and resilience.	Who + Where, aligned with strategy.	Hybrid teams (onshore advisory + offshore execution) Global workforce hubs

Alternative workforce models (outsourcing, offshoring, right-shoring) are growing across all firm sizes

# / OUTSOURCING AS A STRATEGIC NECESSITY

CPA Firms & Non-CPA Firms tap into talent from **all over the world**.

Helps mitigate staffing shortages and sustain operations.



Philippines



India



Eastern Europe



China



South Africa



South America

# / WHY THE PHILIPPINES DELIVERS OPTIMIZED VALUE

FACTOR	PHILIPPINES	INDIA
English Proficiency	✓ High	✓ High
Accent Neutrality	✓ Strong	⚠ Variable
U.S. GAAP Familiarity	✓ Strong	✓ Strong
Cultural Alignment	✓ High	Moderate
Time Zone Overlap	✓ Overnight Advantage	✓ Similar
Staff Retention	✓ Lower Attrition	⚠ Higher Attrition
Integration Ease	✓ Seamless	⚠ Varies by Firm

# / IS YOUR TEAM READY FOR OUTSOURCING?

- ✓ Turning down opportunities due to lack of staff or cost concerns.
- ✓ Project delays and reporting bottlenecks.
- ✓ Growth is outpacing internal capacity.
- ✓ Difficulty hiring and training qualified talent.
- ✓ High overhead makes expansion hard.
- ✓ Burnout from frequent overtime and poor work-life balance.
- ✓ Teams are stuck in daily operations and unable to focus on growth.
- ✓ Client satisfaction is declining due to understaffing.



# YOUR OUTSOURCING PARTNER: THE VASQUEZ ADVANTAGE

# / THE VASQUEZ ADVANTAGE

Our clients benefit from mid-market pricing and direct access to experienced professionals throughout every engagement. We don't over-layer teams or delegate key tasks to junior staff—our engagements are led by seasoned experts who prioritize responsiveness, precision, and results. Organizations that became Vasquez Advantage clients often cite our consistency, cost-efficiency, and hands-on approach as reasons they stay.

## Our Outsourcing Platform in the Philippines

We also help clients by providing lower costs through our global “Outsourcing” model powered by The Vasquez Advantage (TVA) in the Philippines.



### Client Experience

- 30 to 50% Cost Savings
- 24/7 Productivity
- Seamless Integration
- U.S. Partner Oversight
- Skilled, Experienced Professionals
- Some of the largest entities within their industries such as the largest university system in the world, Fortune 500 companies, and more
- CPA firms from \$3 million to \$500+ million in revenue



### Impact Stats

In 2025 alone, TVA delivered more than 81,000 hours of outsourced services, driving 40% revenue growth for clients with minimal overhead expansion.

# / THE VASQUEZ ADVANTAGE

## Two Engagement Options

Both options function as an extension of your team.



### Ad Hoc

Hourly-based support for seasonal surges, special projects, or overflow work.



### Full-Time Equivalent (FTE)

Dedicated personnel at lower cost.



# / VASQUEZ ADVANTAGE SERVICE OFFERINGS



## External and Internal Audit Support

- Can adapt to your firm, company, or organization's audit methodology & software
- Financial Statements Preparation & Review
- Data Analytics (IDEA)
- Planning & Risk Assessments
- Execution of Audit Procedures
- Audit Binder Review
- Internal Audits & SOX Compliance Testing



## Accounting & Controllarship

- General Ledger Management
- AP Processing
- Bank & other Account Reconciliations
- Month-end & Year-end Closing
- Audit Readiness Assessment
- Financial Reports Preparation & Consolidation
- Cash & Bank Forecasting
- G&A Spend Analysis
- A/R Collection Analysis
- Budget Preparation
- Cash Flow Analysis
- Management Reporting
- Financial Forecasting



## Technology Consulting & Assurance

- Artificial Intelligence (AI), Strategic & Predictive Analytics
- Technology Implementation Consulting & Enterprise Performance Assessment
- Cyber Security & Strategic Risk / Control Review
- IT Application Controls Testing (SAS 145)
- IT Governance, Policy, Procedures & Change Control Reviews
- General SOX IT Controls Testing & SOC Review
- Data Backup & Recovery



## Tax Support

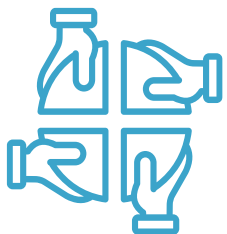
- Tax Return Preparation



## Other Business Consulting Services

- Support tailored to your needs

# / WHY VASQUEZ ADVANTAGE WORKS



## **Custom Fit**

We integrate with your existing processes, adapting to how you work. Widen your capabilities to meet more client requirements as you focus on strategy, internal efficiency, and operations.



## **Skilled Professionals**

Our team in the Philippines has 3 to 10 years of experience working with global CPA firms and have a BS in Accountancy degree from top colleges and universities.



## **Consistent Oversight**

U.S. partners provide continuous quality control to ensure your standards are met.



## **Round-the-Clock Productivity**

Leverage our time zone difference for continuous operations and faster results.



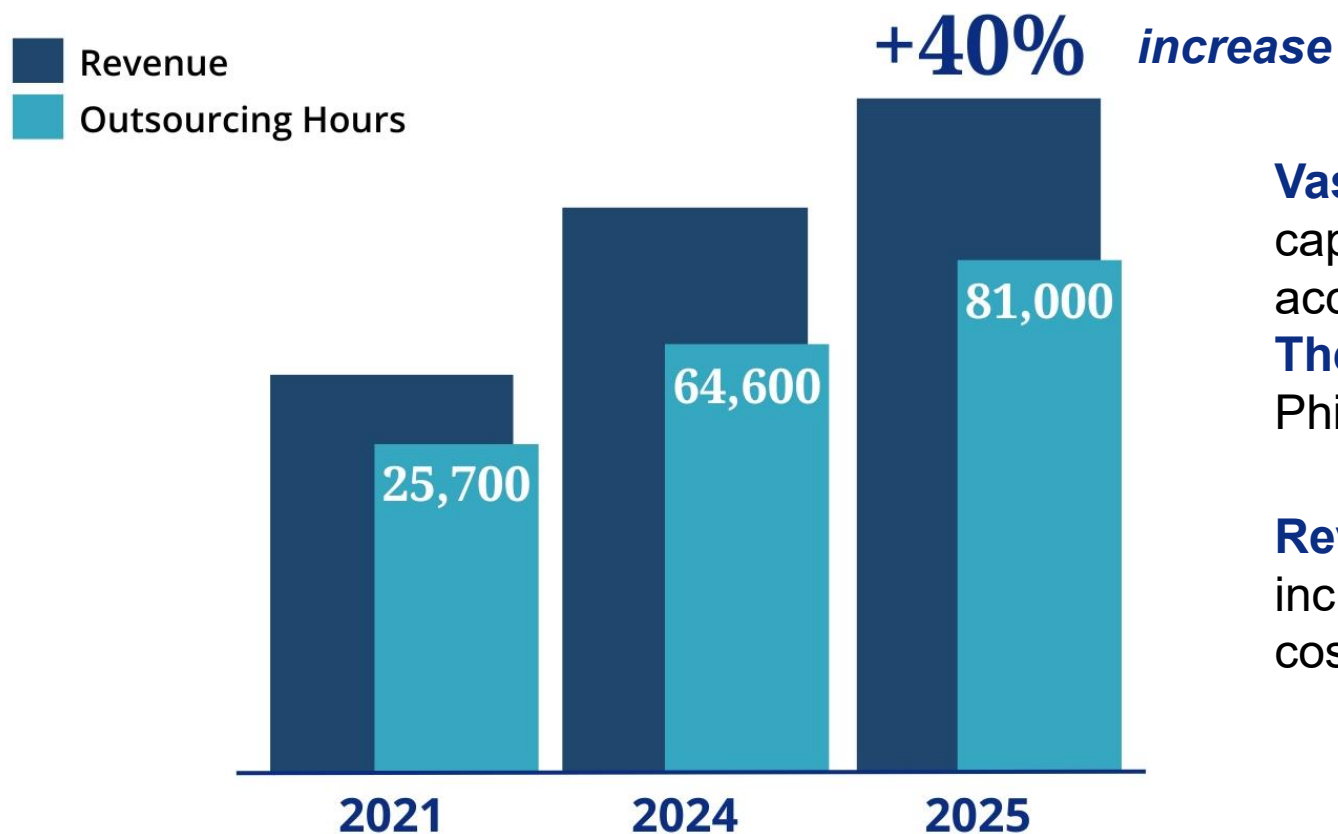
## **Cost Savings**

Save 30-50% on overhead costs, including payroll, office space, and administrative expenses. We extend a competitive price to firms, helping to lower operational costs and provide ongoing profitability.

# / THE PROOF IS IN THE NUMBERS

The Vasquez Advantage Performance Highlights

## *Our Success Story Can Be Yours*



**Vasquez + Company** increased services capacity and revenues by outsourcing audit, accounting, tax, IT and consulting services to **The Vasquez Advantage Center (TVA)** in the Philippines.

**Revenues increased by 40% up** with minimal increase to office/equipment and hiring related costs.

# / TRUSTED BY CLIENTS WE SERVE

## CPA Firms Testimonial

### ***BT&Co.***

"You've done a great job. You always stay on top of your work and update the team with the status of your jobs which is very helpful. We couldn't have done it without you! Your daily updates were very helpful and allowed us to know exactly what was still needed to finish the job. You've been a great addition to the team, and we really appreciate all the hard work that you've put in to help support the team and set us up for success!"

### ***Atchley & Associates, LLP***

"Demonstrated a high level of professionalism, reliability, and exceptional skills in managing responsibilities, tackles every task with great attention to detail and efficiency, and works very efficiently which exceeds our expectations. Has the ability to manage multiple projects for multiple clients at the same time while maintaining accuracy which has been invaluable to our department."

### ***LaPorte CPAs and Business Advisors***

"They get the work done, they respond to me, the communication is open. They also take minimal direction and get the work done fast, so they've been making things a lot easier for me this year than I really could have ever hoped that they would be."

### ***Larson Gross CPAs***

"Thank you to our fantastic team! It was a smooth deadline for us and we are thankful for your support and partnership."

### ***Nonprofit Testimonial***

"Auditors were able to complete the audit under a tight deadline, which made it possible for us to submit the audit reports timely to the Federal Audit Clearing House."

### ***Government Testimonial***

"I would like to say thank you to your entire team for the hard work and dedication... It was a pleasure working with you all. I also recognize during the process the great collaboration with you all and our accounting team. I feel extremely proud to have been involved in such a memorable process."

### ***Healthcare Testimonial***

"Thanks for delivering the draft on time and for the quality of the output. It is amazing that you were able to put this together so quickly. The Vasquez team did a really good job of responding to the client's needs and we deeply appreciate the effort put into it. Once again, thanks for all your help, dedicated attention, and patience."

### ***Employee Benefit Plan Testimonial***

"Thank you for another year of supporting us with the benefit plan audits. I appreciate your team's hard work and partnership."

### ***Finance and Accounting Outsourcing Services Testimonial***

"Your team's understanding of financial reporting for non-profit organizations and FQHCs was impressive, and the professionalism of the entire team was exemplary."

# QUESTIONS?

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**Thank you.**

# / CONTACT INFORMATION

**Vasquez + Company LLP** has over 55 years of experience in performing audit, accounting, and consulting services for all types of private companies, nonprofit organizations, and governmental entities.



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