CWA
CAIN WATTERS & ASSOCIATES

Getting started is seamless with the CWA accounting set-up process

Any dental practice – large or small – needs a rock-solid foundation to ensure future growth. When you are ready, our team of dental accountants are ready to take the burden of managing your financial data for your practice off your plate.

No messy setup process here. In a few easy steps our team will be ready to produce usable monthly financial statements to help you focus on what's most important — practicing dentistry.

Here's how it works:

GET STARTED

1. After talking with your financial planning team or New Client Services representative, a contract will be sent to review and sign electronically.
2. A CWA accounting administrator will then email you to setup your account with us and onboard you to our CWA Client Portal.
3. Upload prior year tax return, bank & credit card statements, loan documents, payroll reports and other necessary documents to your CWA Client Portal.
4. Schedule and attend virtual Xero accounting software training.
5. CWA completes accounting setup and first month's accounting.
6. Set up complete! Receive an introductory email from your new CWA full-time accountant.

MONTHLY

Client uploads documents in the CWA Client Portal and codes non-repetitive expenses in Xero.

Your CWA accountant prepares your financial statements and posts to the CWA Client Portal.

Expand your financial support team with our experienced accountants.

Get started today by contacting your CWA advisor or leave us a message at cainwatters.com/accounting-services.