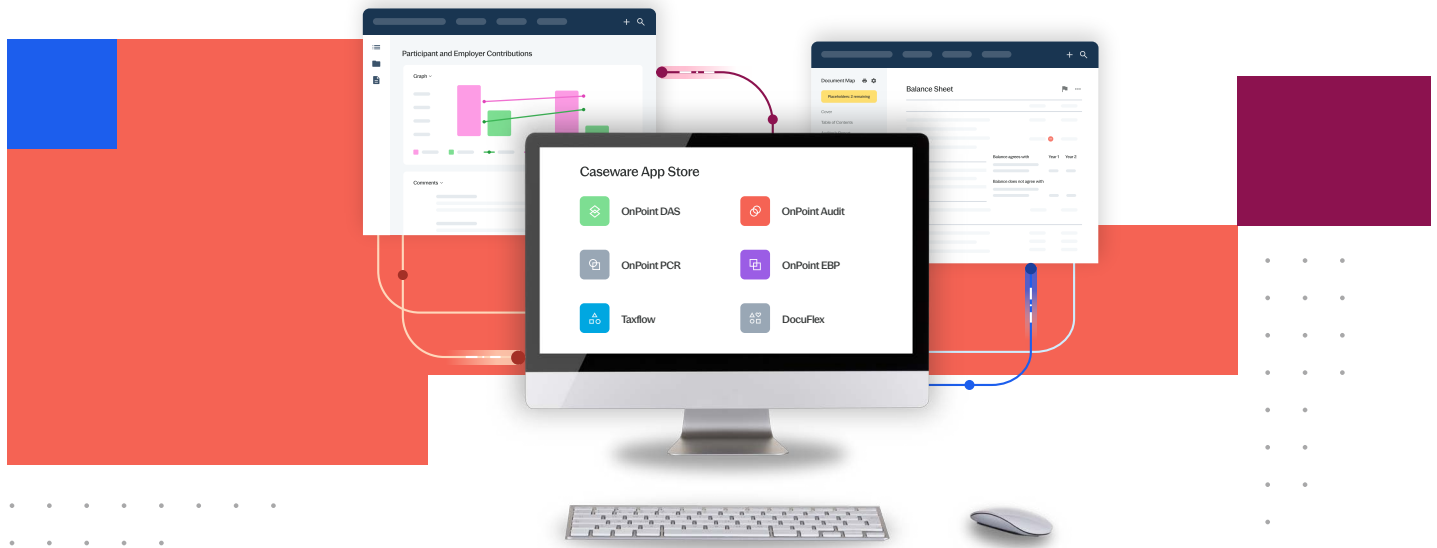




Embracing Change:

Elevating Audit & Assurance Practices
with The All-in-One Caseware Platform



In today's rapidly evolving business environment, the accounting profession is undergoing a significant transformation. The integration of advanced methodologies, industry-specific content and cutting-edge technology is redefining the traditional, compliance-focused audit.

At the same time, challenges such as regulatory changes, required methodology updates, increased competition and resource constraints are forcing firms to seek effective new ways of operating.

At the forefront of this movement is the OnPoint Engagement Suite

The OnPoint Engagement Suite represents the most advanced and comprehensive insights-driven solutions available in the market today. The suite uniquely delivers value across the entire engagement cycle, offering a fully integrated and intelligently guided experience.

The suite includes a robust library of standards-based methodology options and sector-specific content, tools and customizations, all seamlessly integrated within a single platform.

The OnPoint Engagement Suite empowers auditors to deliver unparalleled insights and

value to their clients through both advanced and standard methodologies, while also offering the flexibility to customize those methodologies or even build your own.

Additionally, it boasts an industry-leading portfolio of various engagement types, ensuring auditors have the tools they need to excel in any audit scenario.

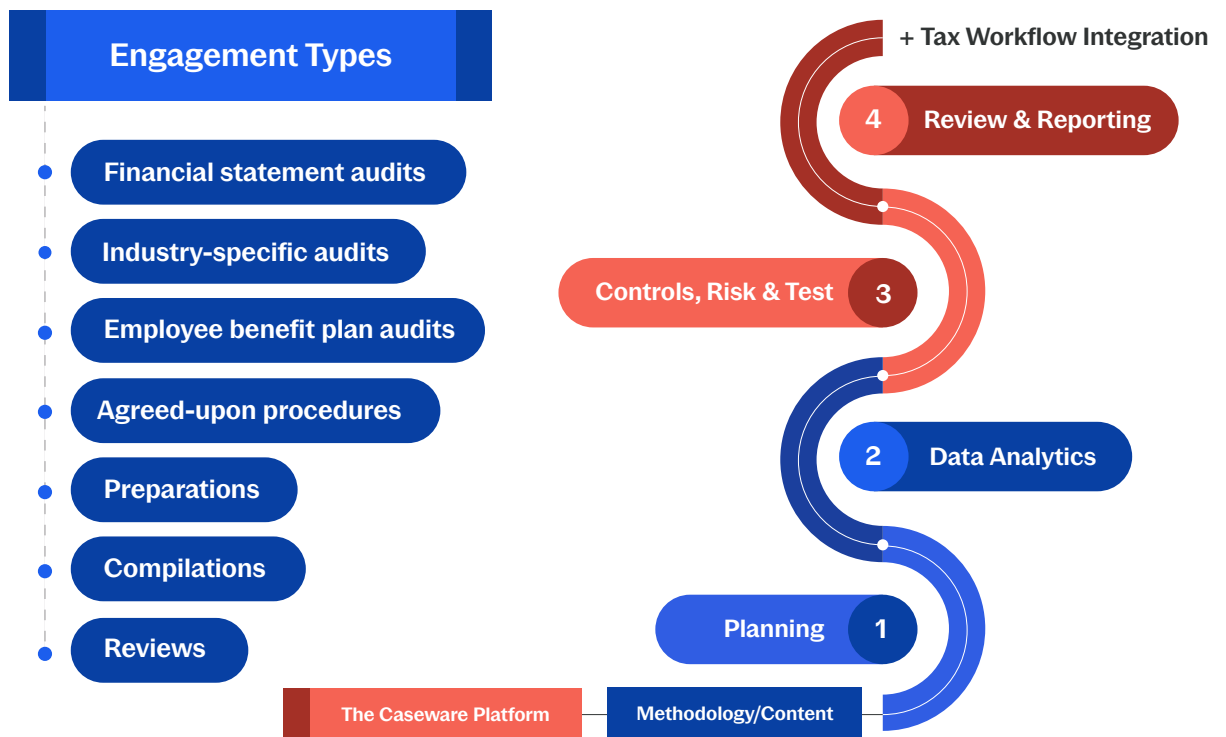
Let's look at some key areas the suite is addressing to help take auditing into a new era.

Answering the increasing volume of engagement types

To remain competitive amidst increasingly diverse client needs and to address changing regulatory requirements, firms are supporting a variety of engagement types for their clients. The OnPoint Engagement Suite provides solutions for a variety of engagement types, including financial statement audits, industry-specific audits, employee benefit plan audits, agreed-upon procedure engagements, preparations, compilations and review engagements.

The entire suite leverages automation, visibility, collaboration and data analytics, giving you access to an extensive inventory to design the right solution for your firm.

Caseware is the only provider in the market that enables your team to perform an end-to-end engagement with value at every step, from planning to financial statements — all within a single platform.



Advancements in audit methodologies

Firms are under increased pressure to evaluate their methodologies based on market activity, including merger and acquisition activity, industry consolidation and the discontinuation of methodologies from long-standing content providers. Additional market factors, such as resource constraints and intense scrutiny from regulators, requires firms to think differently about their existing processes and seek new technologies like cloud computing. A growing interest in data-driven audits, a desire to take on new kinds of work, and a need to meet increasingly high client expectations are all driving practices to re-evaluate their current methodologies.

Audit methodologies are rapidly evolving to incorporate advanced technologies and data-driven approaches. They now leverage AI and automation to provide detailed risk assessments and actionable insights.

These technological advancements enable real-time transaction analysis, in-depth data trend exploration and proactive risk management. The future of auditing will emphasize finding the right methodology to support firm engagements, enhancing audit quality, improving efficiency and delivering greater value to clients.

The OnPoint Engagement Suite includes the Dynamic Audit Solution (DAS) that supports large, complex audits. DAS leverages transformative AICPA methodology, developed by CPA.com and Caseware, along with the Top 100 Firms in the U.S., and enables auditors to deliver a data-driven, risk-level audit.

Also available in the suite is OnPoint Audit, which is based on a methodology developed by Caseware in partnership with a consortium of Top-25 U.S. firms. It offers a more traditional audit approach that enables a comprehensive digital audit that addresses risk at an assertion level, along with flexibility that allows firms to incorporate their own methodologies.

By integrating linked methodologies into the applications, the OnPoint Engagement Suite offers unique tools that drive efficiency, quality and value for firms and their clients. This enables firms to work smarter, achieve modernization goals and thrive in today's complex environment. Key benefits include:

- enhanced collaboration
- improved workflow management
- increased visibility into staff workloads
- boosted productivity with real-time task status

Built-in process automation and standardization further enhance productivity, allowing accountants to focus on delivering more value through client advisory services.

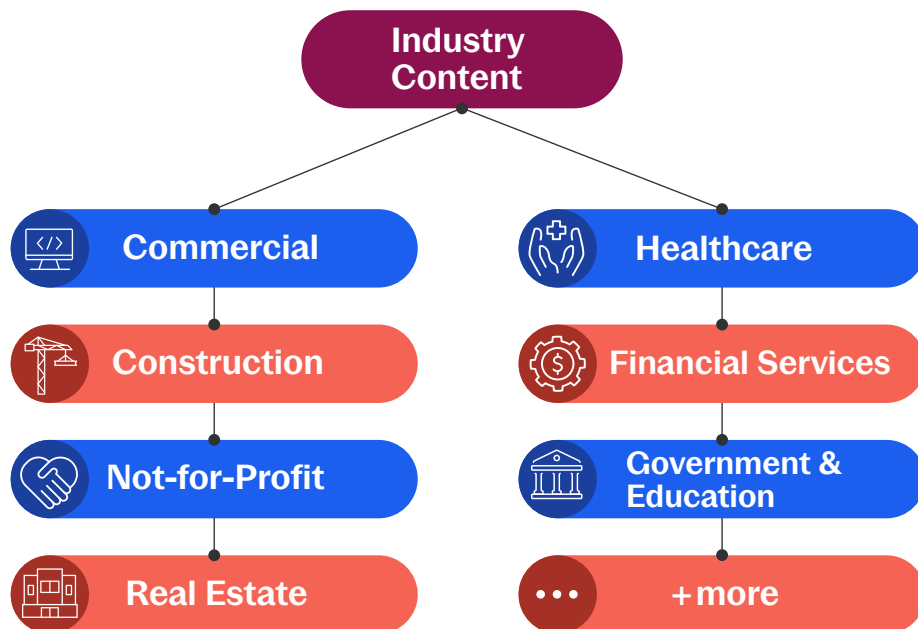


Evolving industry content

The audit profession is increasingly recognizing the importance of industry-specific content. This shift is being driven by the need for deeper insights and more accurate risk assessments. Auditors are expected to have a comprehensive understanding of the unique characteristics, regulatory environments and operational nuances of the industries they audit and the clients they serve.

The OnPoint Engagement Suite offers a comprehensive library of industry content to support auditors in delivering higher-quality audits with deeper insights — ultimately driving greater client value. As part of the suite, all industry content is seamlessly integrated into the application, eliminating the need to source third-party solutions or manage updates from disparate systems.

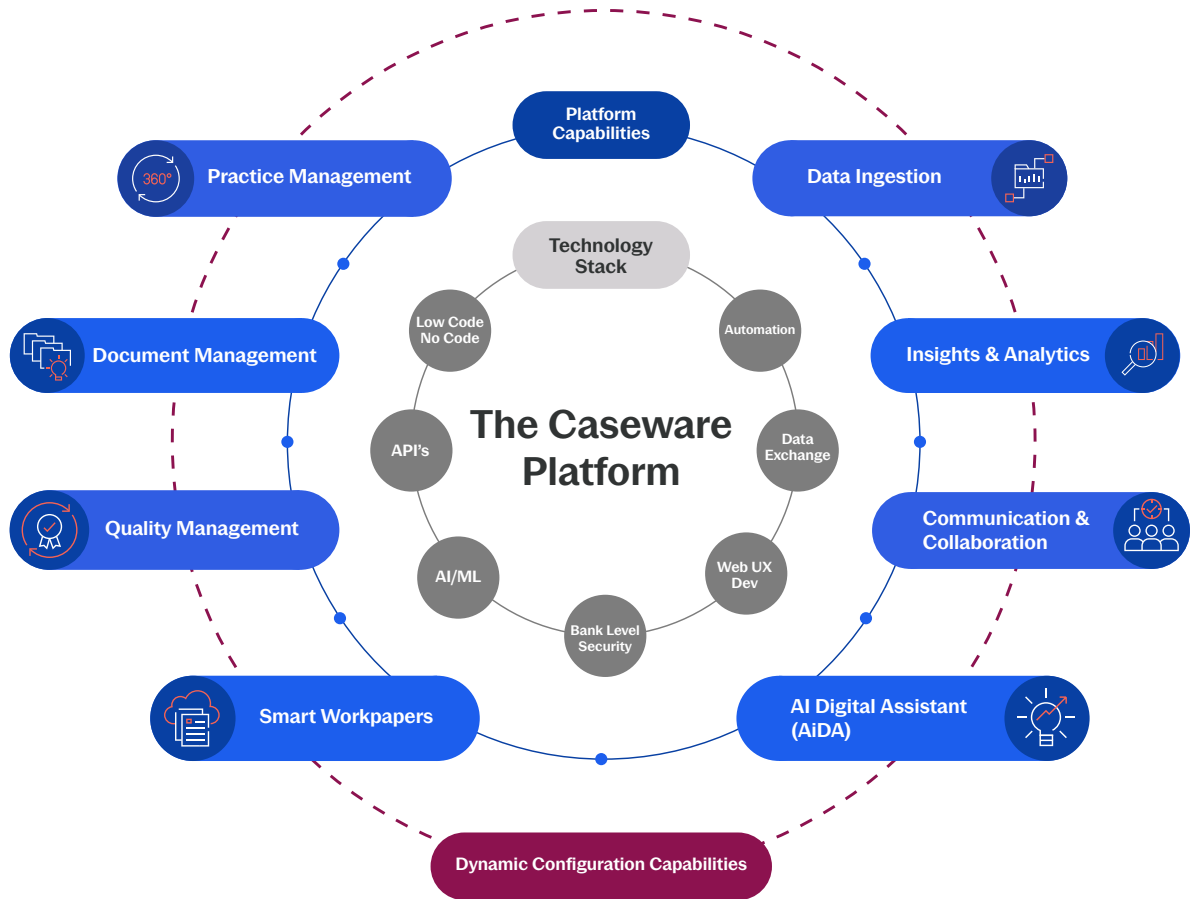
This industry-specific knowledge allows for more tailored and effective audit procedures and provides valuable benchmarks for performance comparison.



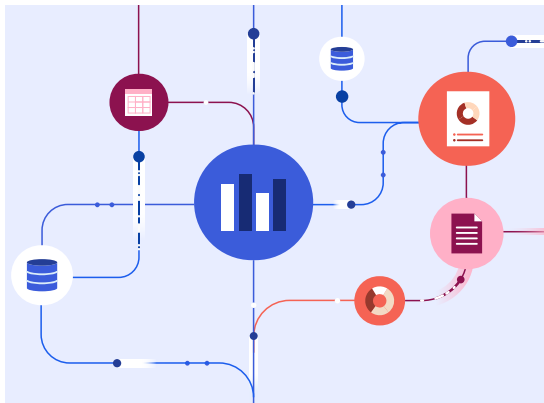
Embracing the future of auditing with the Caseware Platform

Together with our customers, partners and developers worldwide, we have built the future of accounting and auditing on the Caseware Platform. With a fully integrated technology stack, a robust set of platform capabilities and solutions tailored to our industry's needs, we offer the most powerful, flexible and fully integrated platform available today.

The future of audit & accounting is built on the Caseware Platform



Our solutions are flexible, modular and scalable, allowing them to be tailored to your firm's needs both now and in the future. By incorporating Caseware's extensive platform capabilities with industry content, methodologies and compliance frameworks, we provide a complete end-to-end audit solution, enhancing audit quality, efficiency and value, beyond just compliance requirements. You will be able to:



Streamline operations and complete all engagements in one platform

Whether you're conducting financial statement audit engagements, employee benefit plan audits, or specialty non-financial audits, like SOC1/SOC 2 or compliance audits, or other assurance engagements, the Caseware Platform supports a variety of engagement types. Better manage engagement workflows, gain visibility into staff workloads and boost productivity with real-time status updates for all engagement tasks.

Minimize over/under auditing and stop using a same as last year approach

Our leading-edge, fully integrated solutions revolutionize how firms provide risk-based, insights-driven audit services. Compliant with the latest industry requirements, our secure, cloud-based ecosystem supports visibility, collaboration and workflow for your engagements. Leveraging a risk-based, guided methodology allows auditors to be more efficient, identify true risks and focus on driving value instead of repeating past approaches.



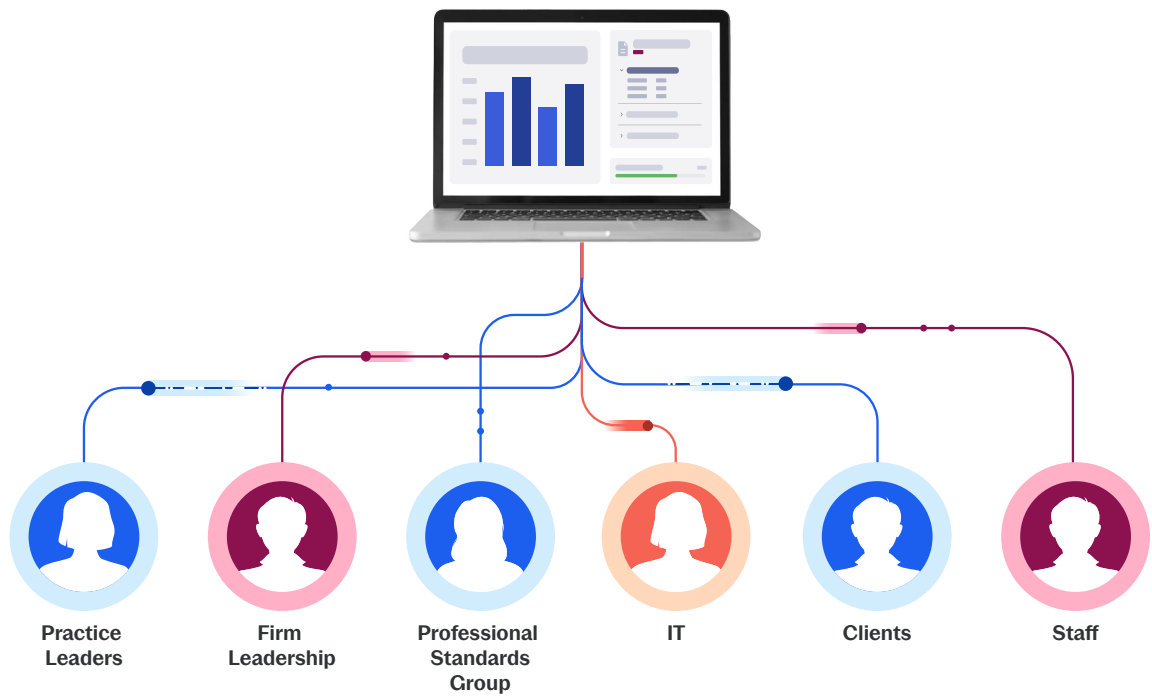
Improve both the auditor and client experience with automation and insights

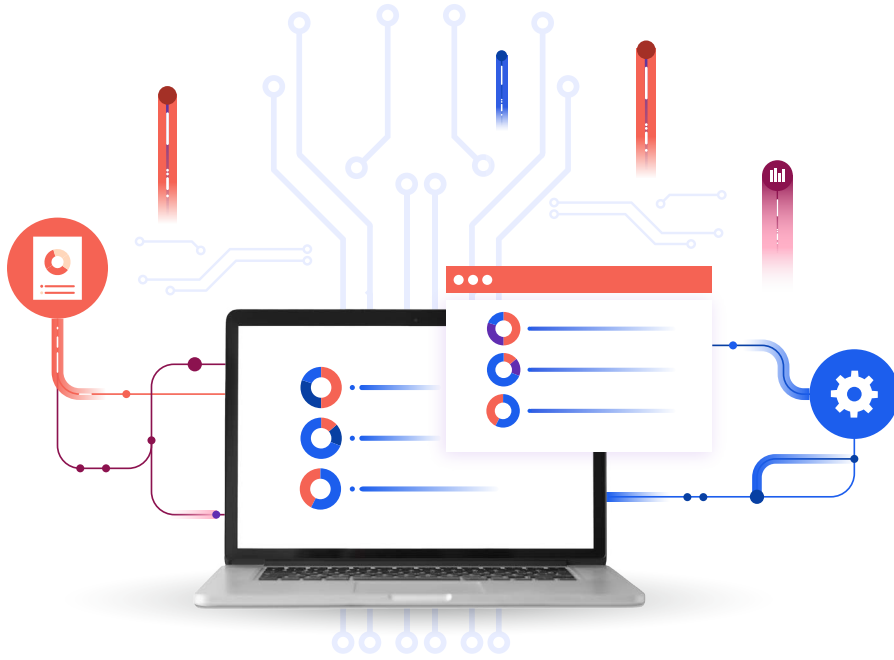
Built-in process automation and standardization help accountants be more productive and focus on client satisfaction in fast-paced environments. Digitizing your audit and assurance process equips your staff with the right tools, enhancing their skills and positioning your firm to attract and retain top talent and clients.

Providing value to all firm stakeholders

Many different stakeholders can experience the benefits of the OnPoint Engagement Suite. This includes practice leaders, who can drive efficiency through standardization and gain real-time visibility into the status of engagements; firm leadership, who will enjoy a reduced total cost of ownership and a greater competitive advantage; and professional standards groups, which can realize a streamlined standards and methodology update process.

Meanwhile, IT will witness an overall reduction in their management burden and staff members will be able to collaborate more easily while continually upskilling. Perhaps most importantly, clients will experience less disruption and gain deeper business insights thanks to the OnPoint Suite.





Support for every step of your migration journey

We're here to help with your transition. Caseware, along with our partners at CPA.com, offers a wide range of professional services to support your firm in migrating your practice to the OnPoint Engagement Suite on the Caseware Platform.

We offer guidance and hands-on support, customizable to your firm's needs and capacity, to help you plan and execute your transition to new, advanced technologies.

We also offer robust implementation support to get your firm up and running in your new environment, including help with migrating engagement files, setting up user roles and permissions, and more.

You'll also have access to comprehensive training support in a variety of modes, including self-directed, train the trainer and live in-person training - led by Caseware & CPA.com experts - to get your staff started and ready to work efficiently.

Ready to get started?

Learn how the advanced methodologies, industry-specific content and other cutting-edge features of the OnPoint Engagement Suite running on the Caseware Platform can elevate your audit & assurance practice.

[Learn more >](#)





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