

The **HOACPA Client Portal**



The HOACPA Client Portal is designed to streamline the document request and sharing processes.

This portal will help your team, and the Newman HOACPA team manage tasks more efficiently, ensuring clear communication, faster turnaround times, and fewer emails in your inbox. The HOACPA Client Portal will simplify your experience and keep engagements on track.

SIMPLE **BUT POWERFUL**



- 1 Engage with our team
- 2 Receive login credentials
- 3 Log in
- 4 Navigate to the specific engagement
- 5 View an up-to-date list of outstanding requests
- 6 Easily drag & drop documents or leave comments for our team
- 7 Our team reviews & approves the documents or comments
- 8 Our team completes the engagement

The HOACPA Client Portal will save you time, reduce unnecessary emails, and keep your engagements moving forward efficiently. Our goal is to make this process as easy as possible for you and your team.

- Quickly navigate to specific engagements
- View an up-to-date list of outstanding requests
- Easily drag & drop documents or leave comments for our team
- Manage multiple associations from one easy-to-use tool



Why **Newman CPA**

Our staff training and understanding of generally accepted accounting principles together with auditing and assurance standards enable us to maintain strong standards.

Our passionate involvement in the community association industry includes providing education to managers, accountants and board members, attending seminars, maintaining strong relationships with other community industry business partners, writing articles, and participating in industry events.

Being responsive to our clients' needs requires our team to continuously work cohesively to anticipate the needs of our clients, as well as responding in a timely and complete fashion to our clients' inquiries and requests.

AUDIT & TAX N A T I O N W I D E



CONTRACTS@HOACPA.COM



HOACPA.COM