

Californian firms in North America work together

“ We look to each other as **collaborators**, not competitors, even though we are in similar markets and overlap in several industries and services. ”

Cyndi LeBerthon, Partner, Wright Ford Young & Co.



Two member firms in the same state see advantages when combining resources and leveraging each other's specialist service expertise to help support clients and overcome capacity issues.

Geographically only 25 miles apart, Partners from member firms O&S CPAs & Business Advisors, LLP, and Wright Ford Young & Co first met back in February 2020.

Despite their close proximity, rather than viewing each other as competitors, they are starting to see the advantages of working together to help each other and strengthen their position in the local market.

Increased capacity

One of the main challenges facing North American firms is finding and retaining staff, which in turn can lead to capacity issues. Both firms recognise that they have similar capabilities and resources and, thanks to the trust established between the firms, are now able to help each other out when necessary.

When Wright Ford Young & Co recently found their team unable to take on a special project due to capacity considerations, they were able to confidently work with O&S on a consultancy basis in relation to the acquisition of a company and purchase price allocation.

Cyndi LeBerthon, Partner at Wright Ford Young & Co comments, “It is great to have a friendly firm to send clients and referrals to when there are

capacity issues, not just when it is an industry or service, we do not perform. When referring a client, we each respect any existing work that firm is performing, and we would not go after that work, having that trust is important. Stop seeing other firms as competitors and find ways to work together to better both firms.”

Member firms in partnership



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Wright Ford Young & Co.

Located in Irvine, California, **Wright Ford & Young & Co.** has been carefully crafted to support the needs of closely-held businesses and high-net-worth individuals.
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Collaborating to service clients

During discussions, O&S and Wright Ford Young & Co soon discovered that in addition to assisting with capacity issues, they could collaborate in other ways.

Both firms have different areas of specialisation and are now able to extend their service offering by cross-transferring their skills. For example, O&S are not-for-profit specialists so now, when Wright Ford Young & Co have enquiries in this area, they are now able to refer them to their colleagues at O&S.

In another case, due to an independence conflict, O&S was unable to perform a client audit, so they confidently referred the work directly to Wright Ford Young & Co.

Investing time in building relationships is vital to experiencing the full benefits of membership to our global accounting network. We're always delighted to see such successful collaborations between our members', and we are looking forward to hearing more success stories in the future!

Get in touch



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“ During our time as members, we have created strong relationships with other member firms, exchanged ideas and leads, and expect business to develop. ”



Kim Onisko, Partner
O&S CPAs & Business Advisors

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