

Get consistent insight with 5300 Call Report Services.

What is it?

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A **quarterly call report** using the Call Report tool in CU*BASE. It can reveal financial viability, trends, and can help guide long-term business planning. Includes training on best practices.

What are the benefits?

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Partnership

5300 Call Report Services are a collaborative partnership focused on leveraging the Call Report Tool to its full potential. Because the data is stored in CU*BASE, it's always available to you.



Reliability

Variances due to error or incomplete data can misrepresent trends and lead you in the wrong direction. That's why we take pride in the accuracy and reliability of our reports.



Expertise

With over 20 years of bookkeeping experience, Xtend's Manager of Back Office Services, Connie Plas lends her expertise to clients wishing to understand and improve their own bookkeeping processes.

Deliverables:

We'll complete the initial setup of automation in CU*Base, financials, run sheets and the first call report. Once the call report is complete, you'll receive a PDF document that details each page.

We can continue to process them for future quarters. Looking to bring the call report process in-house? We'll provide the training!

[Visit xtendcu.com/bookkeeping](https://xtendcu.com/bookkeeping) to learn more!