

THERE'S MOORE TO US!



 James Moore
— WELCOMES —



CANOPY360
TAX & ACCOUNTING



There's **Moore** to Us!

Suzanne Forbes recalls the moment she knew Canopy 360 and James Moore & Company were cut from the same cloth.

"It was really when we were looking at ways to communicate with clients more often and serve them even better," said Suzanne, the managing partner of James Moore. "When Russell talked to me about Canopy 360's relationship managers, I realized we both wanted to serve our clients in the same way. I saw that he approached client service with a team, and that's how we do it as well. //

Founded in 2005, Canopy 360 has a long history of friendly, personal service. However, Russell also had a goal to be a "resource for everything financial"—and that involved bringing the types of solutions you've requested over the years.

Meanwhile, James Moore had long seen Ocala as an area of potential growth and opportunity, with many businesses and organizations similar to our existing clients. Suzanne knew it made sense to have a physical office there.

So after being introduced by a mutual acquaintance, the two leaders began talking. And talking. And talking some more. They spent months getting to know each other, sharing their philosophies and what motivates them. They also discussed their respective firms' core values and visions, as well as how they work to achieve the best for their clients and their employees.

The more they discussed, the more they realized working together would be a perfect fit at every level. Suzanne was intrigued at the thought of having relationship managers and other innovative communication methods used by Canopy 360. Russell saw that joining James Moore could bring new services to his clients and help fulfill his company's longtime dream.



Russell C. Lindsay, CPA

"I think one of the most appealing prospects was bringing the expertise and resources of James Moore, and the additional service offerings we don't currently provide, to our Ocala clients," said Russell. "We would have outsourced accounting, audit, human resources and IT services, just to name a few. //



With so many mutual goals being fulfilled and clients receiving better service as a result, the decision was made to join forces. What has followed since has echoed the warmth and mutual respect experienced by Russell and Suzanne. Team members from both firms have worked together in the ensuing months to make the transition smooth for everyone.



What does this mean for you?

Despite the name change, much of your experience will remain the same. “Our team is staying intact,” explained Russell.

“We’ll be in the same location, it’ll be the same friendly family atmosphere, and we’re going to remain committed to our community involvement in Ocala. //

In fact, James Moore plans to adopt some of the familiar aspects of Canopy 360’s approach to customer service, such as relationship managers. And at the Ocala office, it’s pretty much business as usual with the same accountants and relationship managers.

There’s also a shared commitment to clients. Much like Canopy 360, the James Moore team is well known for attentive, timely and professional service. That part certainly won’t go away. Because working with us means working with a firm whose mission is to provide the highest quality accounting and consulting services—and in a manner you’d expect from a trusted advisor. It’s a mission achieved by sticking to our core values of respect, integrity and technical excellence.

“When you’re combining firms, it can be scary,” acknowledged Suzanne. “(But) we’re bringing the best of both firms together.”

The only difference is that now, you’ll also have access to more services, more experience and more resources; it’s a win-win for everyone.

A “By the Numbers” Look at James Moore

5 offices

250+

dedicated professionals

5,000

businesses, organizations and individuals currently served

55+ years in business

Distinctions



» Named by *Forbes Magazine* as one of America’s Top Recommended Tax & Accounting Firms



» Ranked as a Top 200 Firm by INSIDE Public Accounting every year since 2010



» *Account Today’s* Best Accounting Firm for Women in 2020!



» Recognized as a Best Firm for Equity Leadership by the Accounting MOVE Project



» Net Promoter Score of 82 (compared with an average of 19 in the accounting industry)



Our founder, James F. “Jim” Moore, often said, “Service is the sole purpose of our existence.” We take this commitment seriously, and it shows in how our clients feel about us. From our sincere desire to get to know you and your business to our emphasis on open communication, you’ll see we’re fully vested in your success.

Now, as we like to say...
there’s **Moore** to us.



Dedicated Industry Teams

While we serve all kinds of clients, we've developed specialized teams for several industries that have become cornerstones of our practice. By focusing on their unique challenges, we provide better solutions for them.



Construction

Government

Healthcare

Higher Education
& Collegiate Athletics

Manufacturing
& Technology

Nonprofit

Real Estate

See What's New in Services!

We offer more than traditional tax and accounting services—because a holistic approach to your financial health is the best way for you to thrive! As our client, you now have access to experienced professionals providing a wide range of services:

- » Audit & Assurance
- » Tax Planning & Compliance
- » Accounting & Controllership Services
- » Technology Solutions & Consulting
- » Human Resources Consulting
- » Data Analytics
- » CFO Consulting Services
- » Operational Excellence
- » Transition Planning

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