Advisor 8

Accountants | SMBs
Practice Management & Networking Platform

Drive Growth and Efficiency while Eliminating blind-spots, delays, frustrated clientele and overall churn for Your Firm

80% of Accountants say their Clientele is more frustrated than ever due to enormous delays caused by the lack of tools for practice management

Advisor∞ a single indispensable innovative, yet robust digital platform for supporting the community of Professional Accountants/CPAs/CAs/Book-keepers/Accounting ProAdvisors and their clients (whether they are individuals or small businesses). Advisor∞ is helping Accountants' day-to-day operations by streamlining their routing processes and enabling omni-channel collaboration of client activities

Advisor∞ platform and the ecosystem of applications and tools helps avoid the never-ending friction from operational activities by providing a robust cloud deployed SaaS solution supported by no-nonsense productivity apps, seamless client collaboration and engagement, and real-time transaction management.

CHALLENGES

- Lack of visibility and control over pending transactions and delays leading to frustrated clients

- Growing number of Uncategorized transactions not getting addressed, causing delays in book updates

- Difficult to create, format and present proposals to clients as quickly as possible to gain new business

KEY BENEFITS

- Proactive transaction management and quick client engagement eliminates operational friction

- Automated tools steer clients and accountants for accurate segmentation of 'UnCat' transactions and book updates

- Powerful self-guided tool helps create and present accurate and professionally formatted proposals within no time

www.Advisor8.com   help@advisor8.com

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Advisor 8 Platform is Built for SMBs, and Their Accountants
"Earth's Most Accountant & SMB Centric App Ecosystem"

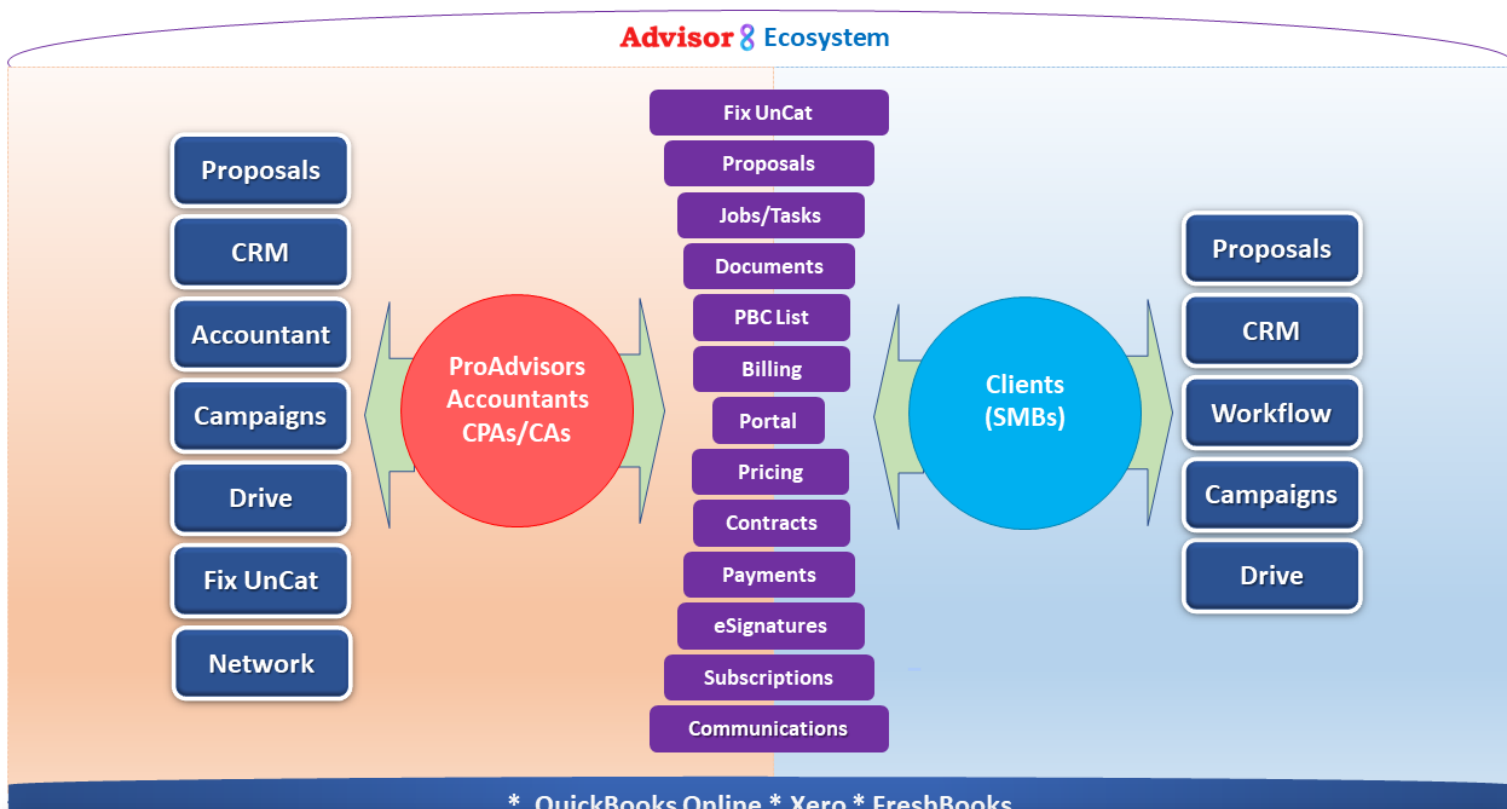## Futuristic Multidimensional Platform Capabilities

Most Accounting Professionals face enormous challenges addressing transaction delays, clientele frustration and constant churn, while client acquisition costs are ever increasing

Control and compliance

- Import Client transactions from books automatically without delay
- Resolve uncategorized transactions and avoid posting delays and book updates
- Enable flaw-less collaboration across accountants, staff and clientele
- Share, store and archive sensitive documents and records securely

Productivity

- Create and present proposals at a lightening speed, with a self-guided tool that helps create proposal accurately, formats elegantly and presents professionally within no time, using predefined templates and embedded tools
- All applications and tools honor access-controls set by organization policies, enable secure transactions and easy to use retrieval tools across all applications

Advisor 8 Ecosystem

ProAdvisors Accountants CPAs/CAs

- Proposals
- CRM
- Accountant
- Campaigns
- Drive
- Fix UnCat
- Network

- Fix UnCat
- Proposals
- Jobs/Tasks
- Documents
- PBC List
- Billing
- Portal
- Pricing
- Contracts
- Payments
- eSignatures
- Subscriptions
- Communications

Clients (SMBs)

- Proposals
- CRM
- Workflow
- Campaigns
- Drive

* QuickBooks Online * Xero * FreshBooks

REAL OUTCOMES FROM Advisor 8 CUSTOMERS

45%	63%	48%
Increase in Transaction Accuracy	Reduction in Client churn	Increase in client engagement

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