



Integrative Advisory Services: Expanding Your Accounting Services Beyond the Cloud

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DESCRIPTION

Stop crunching numbers and start truly serving your clients

Integrative Advisory Services is the CPA, accounting professional and bookkeeper's guide to the future. As technology paves the way for increased self-reliance and DIY financial services, much of the traditional data entry tasks of accounting professionals and bookkeepers will be reduced. Yet, nothing can replace the human side of the client-advisor experience and the desire to improve your clients' businesses with financial information. Technology will continue marching on, so accounting professionals must adapt to the changing marketplace to thrive in this new paradigm. This book shows you how to provide the kind of value that technology cannot: human connection. Rather than simply reporting data, today's accounting professionals have an opportunity to take a much more active role in their clients' business by analyzing the story behind the numbers, understanding both operations and finance, and guiding the client toward the outcomes they need. Creating an ongoing relationship throughout the year allows you to be proactive rather than reactive, and help your client's business at a holistic level.

Your business owner and CEO clients can get the numbers from the computer too—but, they come to *you* for personalized advice, explanations, and guidance based on their unique situation and financial needs. This book shows you how to take on more of an advisory role and become a critical component of your client's success.

- Spend less time crunching numbers and more time advising clients
- Become an integral part of the client's decision-making process

- Provide real value by clearly communicating financial data analysis
- Become the strategic partner your client cannot do without

Cloud technology, machine learning, and artificial intelligence are not the death knell for financial advisors; in fact, they're the opposite—they do the number crunching for you, leaving you more time to provide the personal guidance that no computer could. As the financial advisory industry evolves, *Integrative Advisory Services* is your real-world guide to adapting and thriving.

ABOUT THE AUTHOR

AMY VETTER, CPA, CITP, CGMA, has held many executive positions and leadership roles in the accounting technology industry overseeing customer, sales, education and marketing programs both nationally and internationally. Amy also has experience running multiple client accounting practices, including her own companies and as a partner in a CPA firm. Vetter is an advocate and evangelist for the accounting profession and entrepreneurship. She has inspired thousands of accountants and small business owners as a keynote speaker on business, financial, technology, and work-life balance topics. Vetter has been recognized as one of the Most Powerful Women in Accounting by *CPA Practice Advisor*, one of the Top 100 Most Influential People by *Accounting Today*, and was previously selected as one of the outstanding 40 under 40 by *CPA Technology Advisor*.

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