



# CashFlowTool Helps Innovating Accounting Solution Expand Services With Cash Flow Forecasting and Management



IAS is an accounting firm located in Auburn, WA. They provide accounting and advisory services to business clients along with tax services to businesses and individuals.



The IAS team has a combined 55 years of experience. They deliver their expertise and insights to clients with personalized service and by leveraging technology.



Like many other accounting firms, the IAS team was using Excel to forecast cash flow before finding and implementing CashFlowTool.



## Why IAS chose CashFlowTool:

1. Managing manual Excel spreadsheets for forecasting clients' cash flow was inefficient and burdensome.
2. It enables deeper discussions with clients to build their advisory practice.
3. It helps attract their ideal clients: Those who are serious about utilizing their financial data and looking to grow.
4. It's simple to set up and is user friendly for both IAS and their clients.
5. It's scalable and adds value to their overall package offerings.

## How IAS' clients benefit:

1. Immediate access to an always up-to-date cash flow forecast they can rely on to make better business decisions.
2. Can keep an eye on the metrics and KPIs that matter to them most using customized dashboards set up by the IAS team.
3. Engage in proactive conversations with the IAS team about decisions their management teams needs to make.



*CashFlowTool has been an integral tool to building our advisory program.*

Kimberly Campbell, Director of Accounting

### About CashFlowTool

CashFlowTool is the premier advisory tool used by Accountants and Bookkeepers to deliver cash flow forecasts and insights to their clients in minutes, not days. By leveraging CashFlowTool's CashLearn™ technology and integration with QuickBooks, firms can finally move beyond the manual spreadsheet process to deliver forecasts accurately and efficiently.