



TECH STACK

CLIENT COMMUNICATIONS

Office 365 Microsoft Teams
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DOCUMENTS & PROCESSES

fy ATO smartdocs OneDrive

PASSWORD SECURITY

keeper

Practice Management Accounting & Tax Compliance

xero xero

PROJECT MANAGEMENT

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ENGAGEMENTS & ONBOARDING

Proposify

EXPENSE MANAGEMENT

Hubdoc

CORPORATE / TRUST COMPLIANCE

now infinity

DIRECT DEBITS

ucollect ezidebit stripe

CLIENT ADVISORY & REPORTING

Fathom

HUMAN RESOURCE SUPPORT

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MARKETING

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Canva exclaimer

LEARNING

CCH