



TECH STACK

CLIENT COMMUNICATIONS

Office 365 Microsoft Teams

DOCUMENTS & PROCESSES

fyi ATO smartdocs OneDrive

PASSWORD SECURITY

keeper

Practice Management Accounting & Tax Compliance

xero xero

PROJECT MANAGEMENT

monday.com

ENGAGEMENTS & ONBOARDING

Proposify

EXPENSE MANAGEMENT

Hubdoc

CORPORATE / TRUST COMPLIANCE

now infinity

DIRECT DEBITS

ucollect ezidebit stripe

CLIENT ADVISORY & REPORTING

Fathom FUTRLI

HUMAN RESOURCE SUPPORT

employsure workplace confidence

MARKETING

WordPress SurveyMonkey Canva exclaimer

LEARNING

CCH