

The background is a vibrant green gradient, transitioning from a lighter shade on the left to a darker shade on the right. Overlaid on this are several abstract, rounded shapes in various shades of green, creating a layered, modern aesthetic.

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The session

Implementing Cloud Applications for a CPA Firm

In this panel discussion, CPA firms will illustrate how cloud applications are improving workflows in CPA practices and show how their clients are benefiting. They will also share their roadmap for moving CPA firms into the cloud.

Today's Moderator



James Young

Owner - James Young Chartered
Professional Accountant

Today's Panelists



Melanie Schroeder

RPC, CPA, CGA

@likeitwasmine

Today's Panelists



Bob Wang

ctrl Leader of BC Region, ctrl by
Deloitte

@Bob_Wang23

Today's Panelists



Martha Banner

Western Regional Cloud Lead,
Grant Thornton LLP

Panelists



James Young



Melanie Schroeder

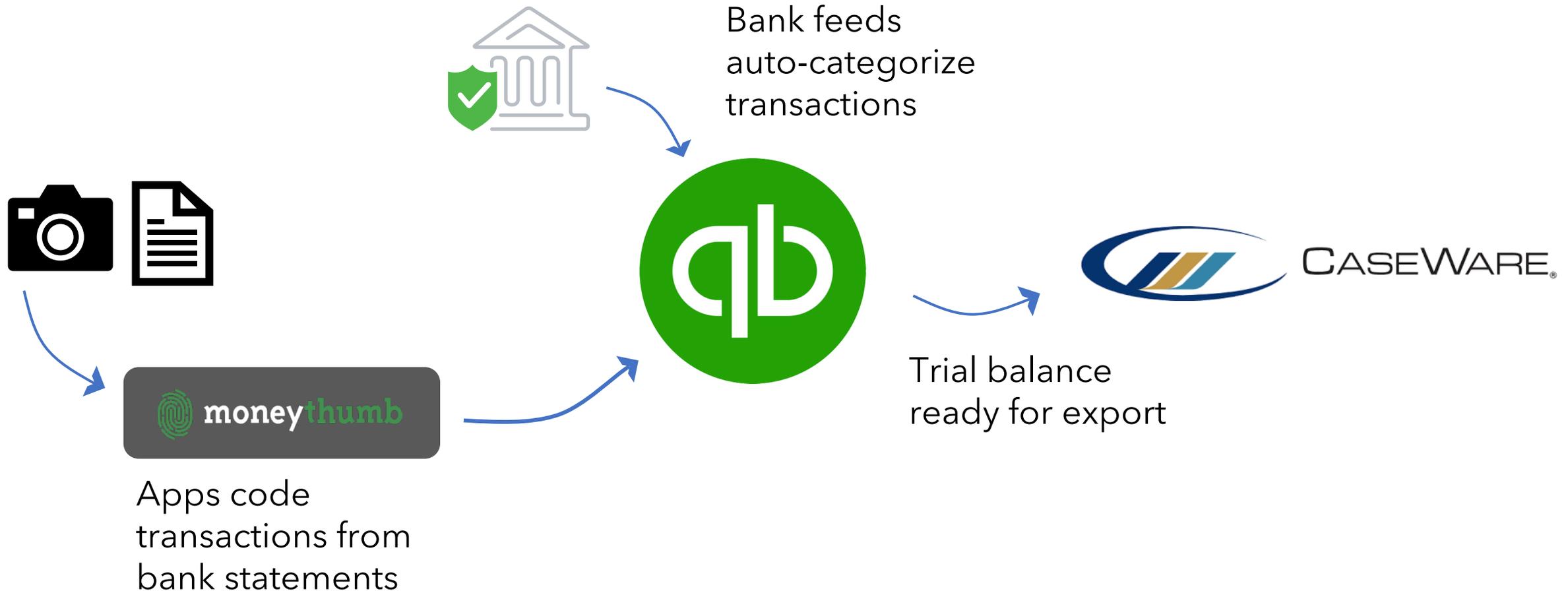


Bob Wang

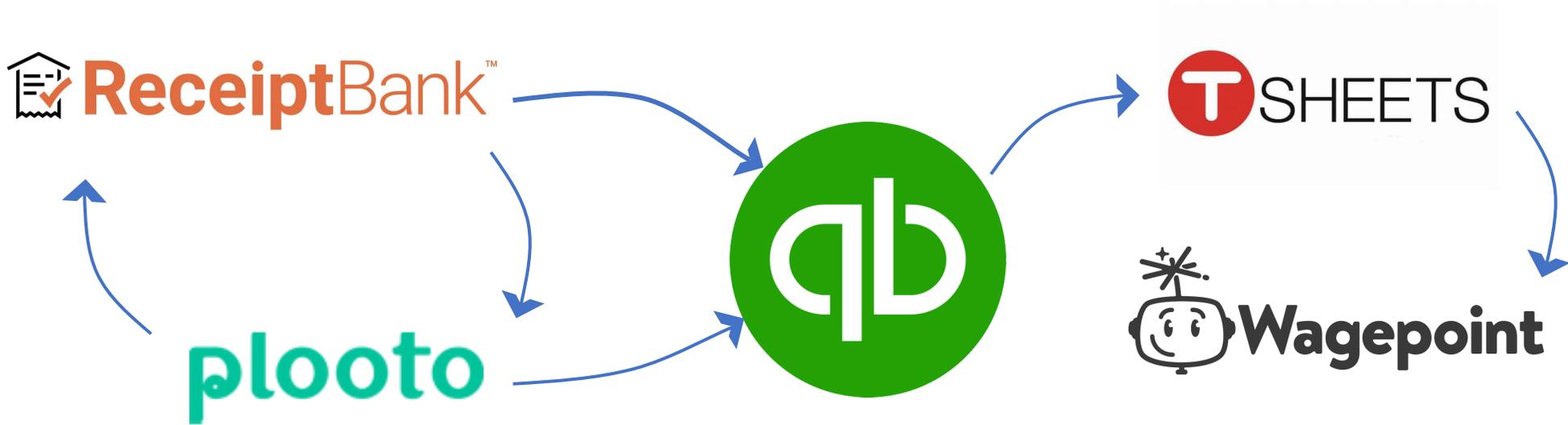


Martha Banner

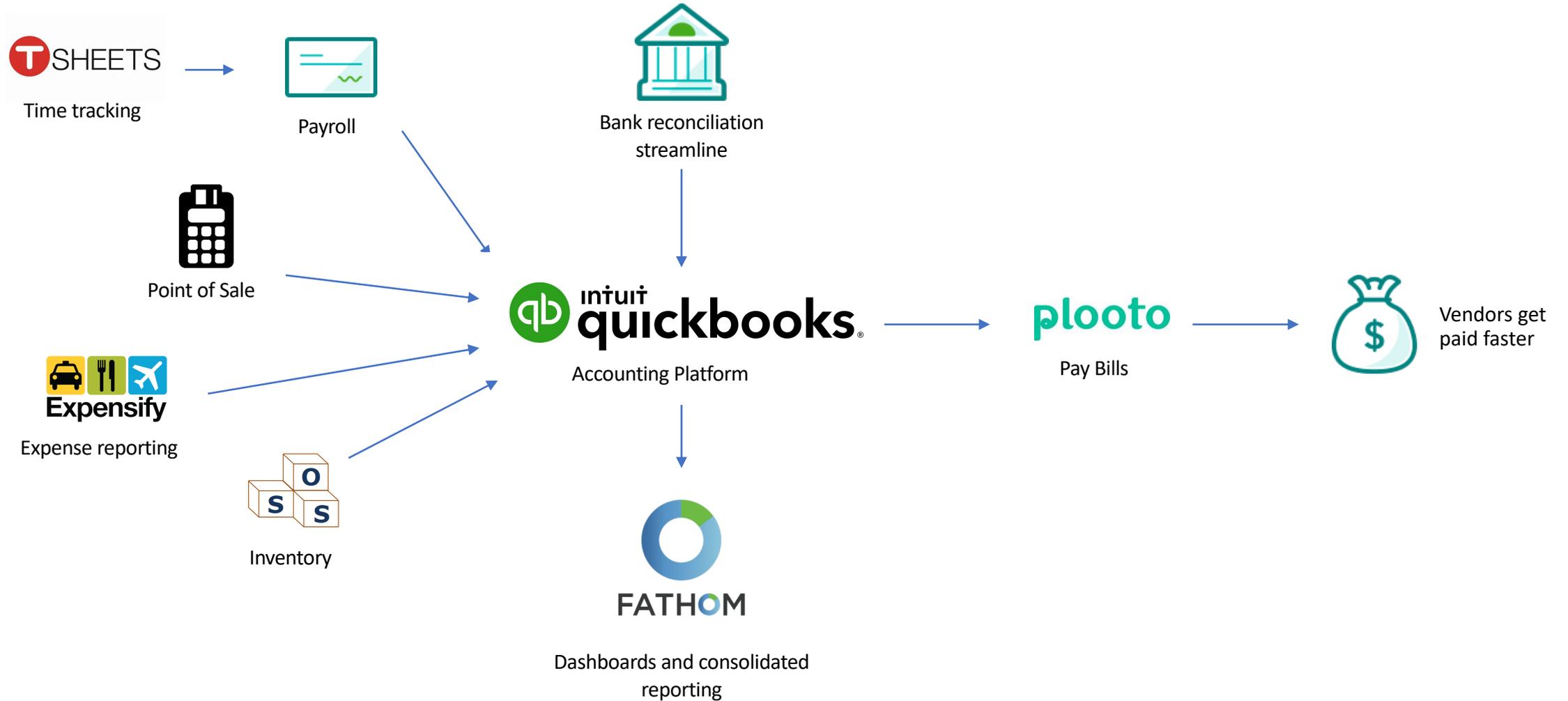
Annual Client Automation



A connected workflow



RPA + Advisory Workflow Solution



How technology benefits staff



Eliminates most data entry



Frees up staff time



Higher value work



Less chance of human error

Tasks CPA Firms can Automate

- Bank Data Download
 - Receipt Capture
 - Data Entry
- Document Collection
 - AR/AP
- Practice Management
 - Proposal Letters
 - Reporting

Contact



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