

CloudAdvisorSM

Cloud-based Business Management Solution

The Engine that Powers Today's Small Businesses

What is CloudAdvisor?

CloudAdvisor is our suite of internet-based technologies that gives you real-time information and analytics on any desktop or mobile device. From accounting and bookkeeping to timekeeping, payroll, expense reimbursements, and more, CloudAdvisor takes the time and legwork out of running a small business, freeing you to spend your time doing more of what made you successful in the first place. For an affordable monthly fixed fee, you can completely transform the way you manage the financial aspects of your business.



Run Your Business Better

Our system provides you with the peace of mind that all your accounting needs are being managed by your trusted advisor. Collaborating with us through CloudAdvisor may also reduce or eliminate the need for costly full-time bookkeeping staff.

CloudAdvisor will transform the way you run your business:

- **Go paperless!** Banish cumbersome paper documents from your management process. Manage your documents securely online.
- **Manage accounts payable with ease.** View and pay your bills securely online.
- **Automate expense reimbursements.** Snap photos of your receipts, and CloudAdvisor will automate the process of categorizing and approving expenses, saving time and legwork.
- **Take the pain out of payroll.** You can conveniently enter your payroll data online for processing. Once processed, we return paychecks, direct deposit remittances, and post employees' pay stubs to their own secure portals.
- **Get your vital signs with easy-to-read dashboard analytics.** Take in detailed visual snapshots of your business with the succinct convenience of graphic dashboard information. You'll manage your business with at-a-glance efficiency and precision.



Small Business Advisors
More Than "Just" An Accountant

How to Implement CloudAdvisor

We'll work with you directly to make sure that your adoption of CloudAdvisor is smooth and virtually effortless. Implementation begins with a thorough assessment of your business operations and the selection of the appropriate service plan. We'll also help you with technical setup (i.e. document scanner, mobile device configuration, logins, etc.).

Setup & Training—Our setup process involves an assessment of your business's accounting requirements. We'll provide instruction on how to process financial data in the CloudAdvisor environment to manage your back office tasks. Our firm will also assist you in designating a point of contact (POC) in your office. We will train the POC on the process of collaborating in the cloud-based environment, including the use of tools hosted on our firm's website.

Service Plans—CloudAdvisor is flexible and scalable; it's designed to meet the financial requirements of all kinds of small businesses and can be configured to provide services on a daily, monthly or annual accounting cycle, depending on the rhythm of your business operations. Core services may include:

- Managing daily transactions
- Online payroll
- Monthly reconciliations and reporting
- Tax planning and preparation
- Access to our digital platform

“CloudAdvisor empowers you to manage your business with digital dashboard precision on any desktop or mobile device. It's a secure, cloud-based way to run your small business with the portability and power today's entrepreneurs need.”

Contact Us Today

For more information on CloudAdvisor or other services, please contact our firm. We are happy to discuss how we can help you meet your business goals. We look forward to hearing from you.

Visit our website:
www.sbadvisors.cc

Give us a call:
410.721.6000



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