

(continued from front flap)

Take advantage of new technology and let it do the tedious number crunching for you. Retool your skills to get ahead of the pack and help your clients improve their businesses at a holistic level. With *Integrative Advisory Services* as your guide, you can integrate advisory services into your practice and expand your services beyond cloud technology to become truly valued by your clients.

AMY VETTER, CPA, CITP, CGMA, has held many executive positions and leadership roles in the accounting technology industry overseeing customer, sales, education and marketing programs both nationally and internationally. Amy also has experience running multiple client accounting practices, including her own companies and as a partner in a CPA firm. Vetter is an advocate and evangelist for the accounting profession and entrepreneurship. She has inspired thousands of accountants and small business owners as a keynote speaker on business, financial, technology, and work-life balance topics. Vetter has been recognized as one of the Most Powerful Women in Accounting by *CPA Practice Advisor*, one of the Top 100 Most Influential People by *Accounting Today*, and was previously selected as one of the outstanding 40 under 40 by *CPA Technology Advisor*.

Praise for **Integrative Advisory Services**

“Integrated Advisory Services is a timely tool for anyone looking to get into the client accounting space with true meaning and depth to their practice. Amy’s experience as a small firm practitioner, combined with her family lineage of CPAs and passion for the profession shines through in helping firms build a successful client accounting practice. The term ‘Cherished Advisor’ is a great term to get CPAs thinking differently about this practice. Many think technology will disrupt and disintermediate what they do for clients. Yet, as Amy explains well, it can actually put the ‘public’ back into CPA and get practitioners re-focused on the human element which the client will value highly.”

—**Mark J. Koziel, CPA, CGMA**, Executive Vice President, Public Accounting, Association of International Certified Professional Accountants

“Amy Vetter offers some keen insights into the nature of the accounting profession and our relationship with technology. She connects her personal family story and sheds new light on the future of accounting. One thing is certain, the future is about relationships and the human side of accounting. She will make you want to get out from behind your desk and out with clients or out in the business operations. This is a must read for every accountant and CPA.”

—**Tom Hood, CPA, CITP, CGMA**, CEO, Maryland Association of CPAs, Business Learning Institute

“Technology is no longer just a business *enabler*—it has become the *product*. The CPA advisor is the specialist to fine-tune the accounting product and make it more meaningful for the client. This integrative approach is the best of both worlds for the business community. No matter what technologies future accounting and financial professionals will have at their disposal, it is the human connection that counts, as Amy Vetter so aptly points out in her new book.”

—**Loretta Doon**, CEO, CalCPA/CalCPA Education Foundation

“Today’s successful accountants don’t just tell you what the numbers *are*, they tell you what the numbers *mean*. They spot trends, they guide you into the future, they remove stress, they shine the light on problems, they offer solutions, and they are indispensable to the success of your business. Amy Vetter’s career has led her through every aspect of accounting and business. She offers an engaging and mindful perspective on how accounting professionals can provide true and lasting value to the clients they serve.”

—**Gail Perry, CPA**, Editor-in-Chief, *CPA Practice Advisor*

“Having known Amy Vetter for the better part of my 15 years covering the accounting profession, I can say that she helps to unequivocally define what it means to be a ‘thought leader’ in this space. Her unwavering commitment to the growth of this profession, through sharing of her own knowledge and experiences has been evident throughout her career regardless of the many professional titles she’s held. She regularly places the profession’s advancement and the growing need of their service among the small to mid-sized business world above all.”

—**Seth Fineberg**, Managing Editor, AccountingWEB.com

Cover Design: Wiley
Cover Image: © Jorg Greuel/Getty Images

\$39.95 USA/\$47.95 CAN

ISBN 978-1-119-41597-8



9 781119 415978

WILEY

Also available
as an e-book

Vetter

Integrative Advisory Services

Integrative Advisory Services

Expanding Your Accounting Services Beyond the Cloud

Amy Vetter, CPA

WILEY

WILEY

With the introduction of cloud technology, much of the traditional data entry tasks of CPAs, accounting professionals, and bookkeepers has been greatly reduced. This is due to rapid technological innovation in which businesses can deploy high-integrity cloud-based systems, machine learning, and artificial intelligence.

Technology will continue its relentless march, so accounting professionals must adapt to the changing marketplace in order to thrive in this new paradigm. *Integrative Advisory Services* offers CPAs, accountants, and other financial services professionals a method for tapping into the power of cloud accounting technology in order to become a trusted strategic partner with their clients. Nothing can replace the human side of the client-advisor experience like accounting professionals’ ability to improve their clients’ businesses with reliable financial information.

Written by Amy Vetter—a noted expert on current accounting strategies—*Integrative Advisory Services* is filled with the information needed to help offer personalized advice, explanations, and guidance based on a client’s unique situation and financial needs. Vetter shows how to create an experience for your clients that they have not had before with other accountants or bookkeepers. By becoming an integral part of the real time decision-making process, your services are delivered proactively, rather than reactively, and you understand both the operational and financial sides of the business.

(continued on back flap)