



Proven Experience Serving Wealth and Asset Management Firms



Sage Intacct could be a fit if...

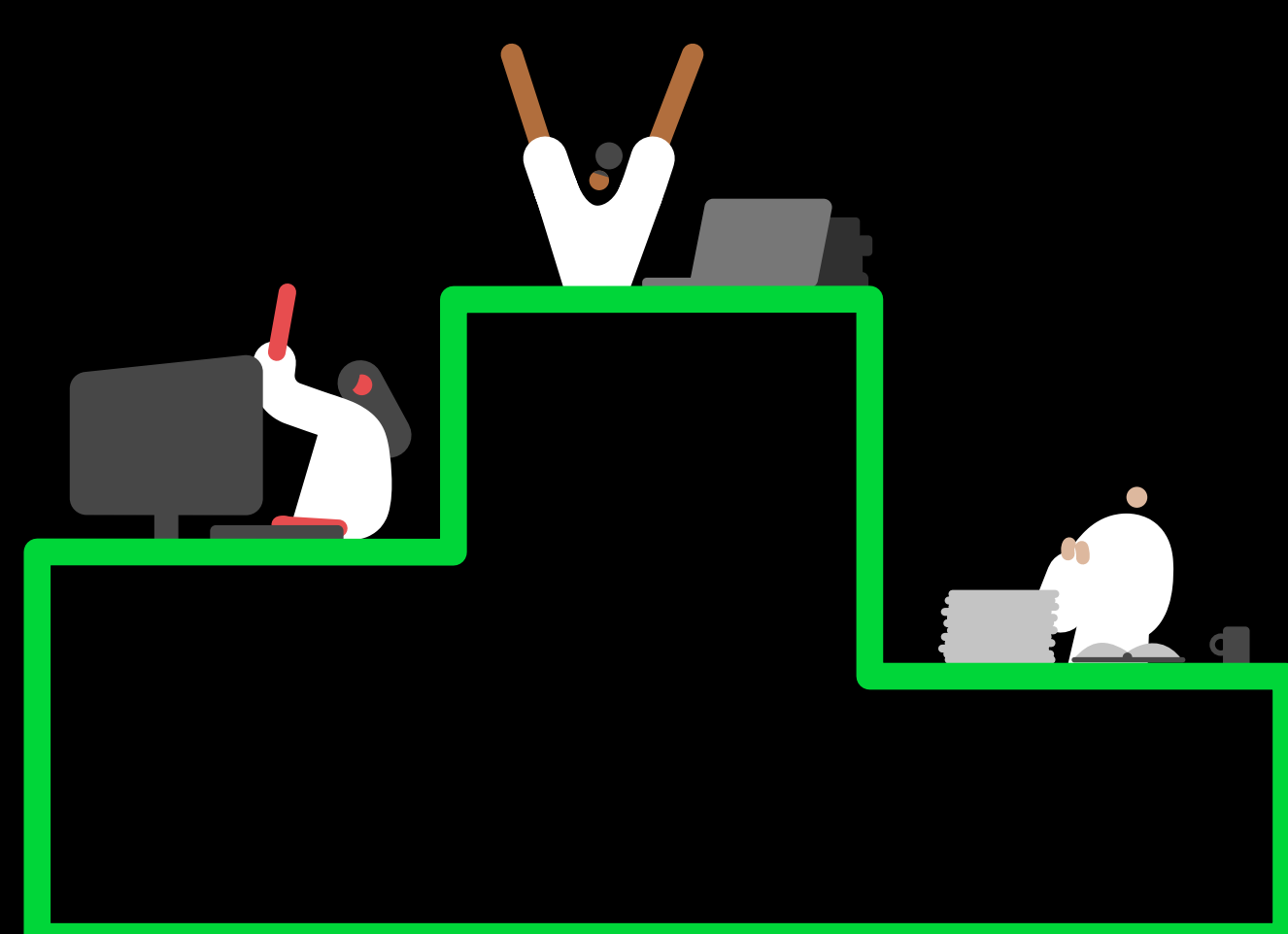
- You struggle to manage multiple entities using current systems.
- You feel that you have “outgrown” QuickBooks or other legacy systems.
- It takes too long for you to close your monthly books.
- You need better insights into firm performance.

Illustrative Sage Intacct Wealth and Asset Management Clients:



Product Highlights

- Cut monthly close time by 50% with continuous consolidations.
- Make data-driven decisions with visibility into key financial and operational metrics.
- Integrate with popular business applications—can be synced with investment platforms such as Addepar.
- Improve overall finance efficiency up to 60% using customized dashboards and automated workflows.
- Control access to data based on roles.
- GAAP Compliant.



Recognized by Finance Industry Experts:



First and only preferred provider of the AICPA.



Sage Intacct received the **highest score** in Core Financials for the Lower Midsize Enterprises in Gartner’s Critical Capabilities Report.

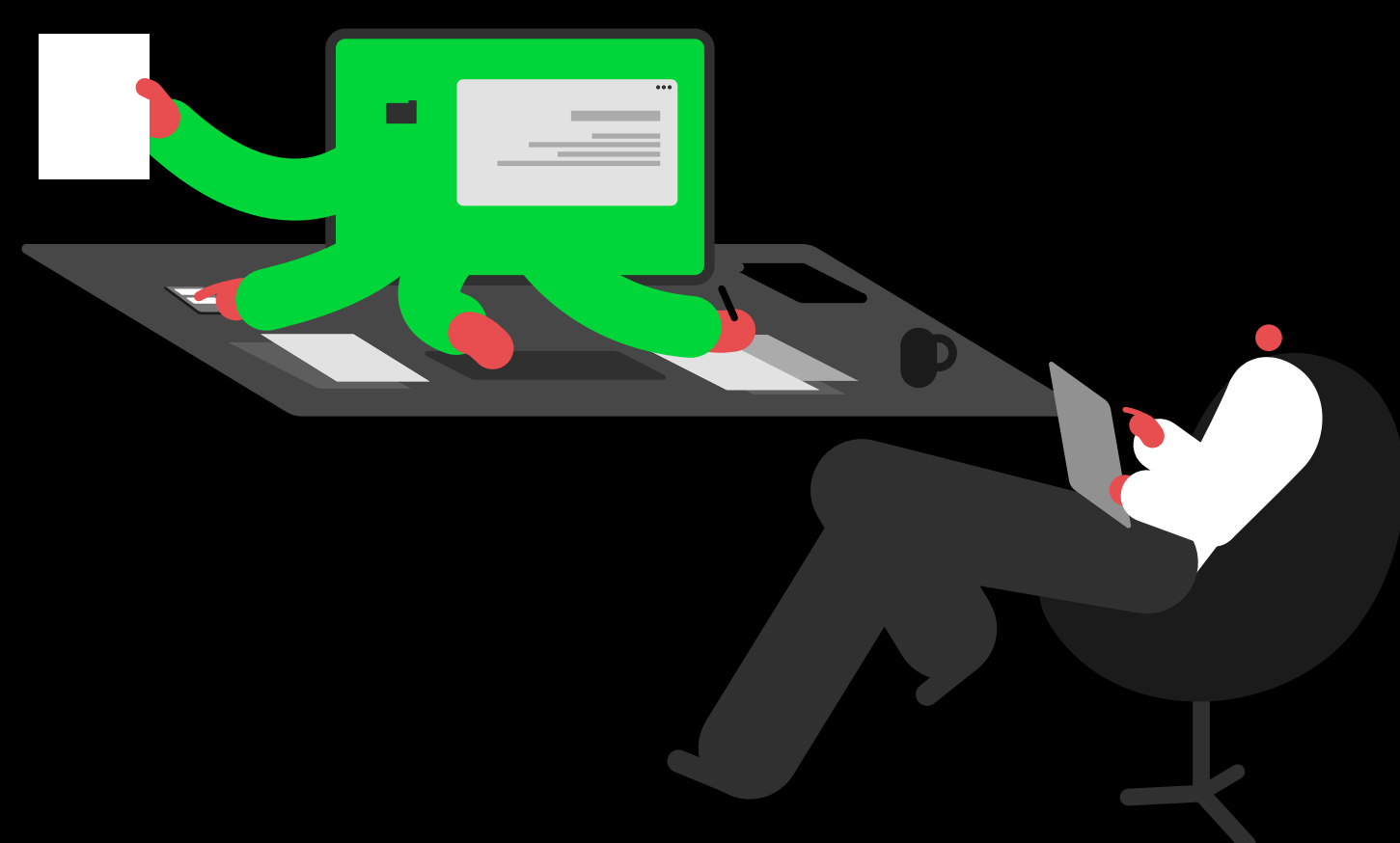


Highest customer satisfaction score for the Accounting Software and ERP Systems categories on G2 Crowd.

What our customers are saying:

“I now have more time to evaluate operations and evaluate investments. I can now spend more time working on investing funds than just tracking them and looking at history in our books.”

Vice President of Operations,
Pride Investment Partners



A Sage partner



Leverage

<https://www.leveragetech.com.au/>

Our success is driven by referrals, indicating our ability to deliver exceptional business solutions. We prioritise client goals and provide tangible benefits with a fast ROI, going beyond ERP solutions to deliver true business outcomes

