

The
'APPY HOUR[®]
with Liz & Heather
www.theapphour.com

Firm Spotlight with PAG Fiscal Services



Meet your Hosts

The
'APPY HOUR[®]
with Liz & Heather
www.theappyhour.com



Heather Satterley

Director of Education and Media, Woodard

Liz Scott

CEO, Liz Scott Training & Consulting



Kari Beebe

Quickbooks Online ProAdvisor

- Kari founded PAG Fiscal Services in 2013, specializing in small law firms and female entrepreneurs. She runs the firm with one contractor handling bookkeeping tasks.
- Embraces remote work to balance business and family. Enjoys hiking, tennis, and running a girls' basketball league in her free time.
- Contributed to the book "She Owns It," sharing entrepreneurial experiences to inspire others.



Proposals



Approval Workflow



Practice Management



Accounts Payable



Inventory



Outsourcing



Training



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Agenda

- **Overview of workflow**
- **Peek inside the internal tech stack**
- **Special app highlight**
- **Look at external stack**
- **Special app Highlight**



FISCAL SERVICES

pivot > adapt > grow

Firm Insights

- Team Size: 2
- Client Size: 25
- Niche: Small Law Firms, Solo and Micro-Entrepreneurs mostly Female counselor
- Growth Goals: Growing client base with tailored financial solutions for law firms

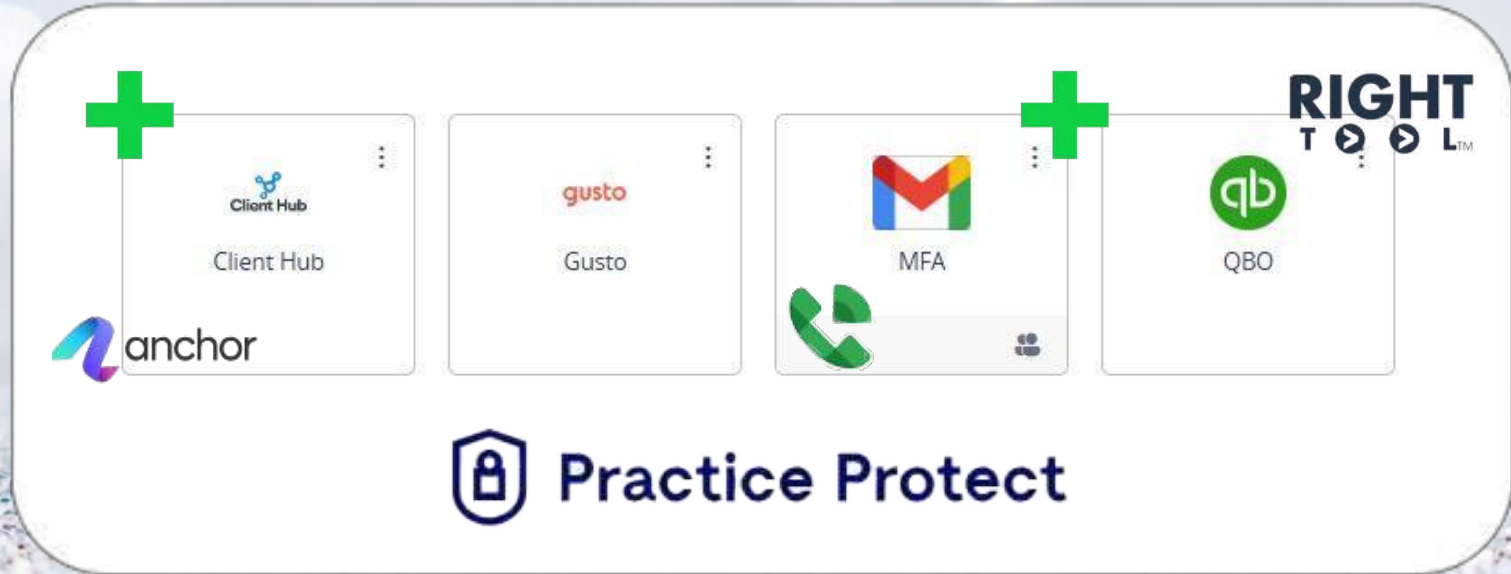


Internal Apps

- Client Hub
- QBO
- Outlook
- Zoom
- Anchor
- Gusto
- Practice Protect
- Clockify
- Dropbox

PAG - Get the Work

Done  **Client Hub**




The image shows a mobile app dashboard with four app cards in a row. Each card has a green plus sign in the top left corner and a three-dot menu icon in the top right corner. The first card is for 'Client Hub' with the Anchor logo at the bottom left. The second card is for 'Gusto'. The third card is for 'MFA' with a green phone icon at the bottom left. The fourth card is for 'QBO' with the 'RIGHT TOOL' logo at the top right. Below the cards is the 'Practice Protect' logo and text.

Client Hub
Client Hub
anchor

gusto
Gusto





MFA





QBO
RIGHT TOOL™

 **Practice Protect**

Client Hub

2.Company Apps (9)

 AMEX	 Google Super Admin	 Ameris Bank - PAG	 Wings FCU
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 Godaddy	 Chase	 Google Workspace	 Fidelity
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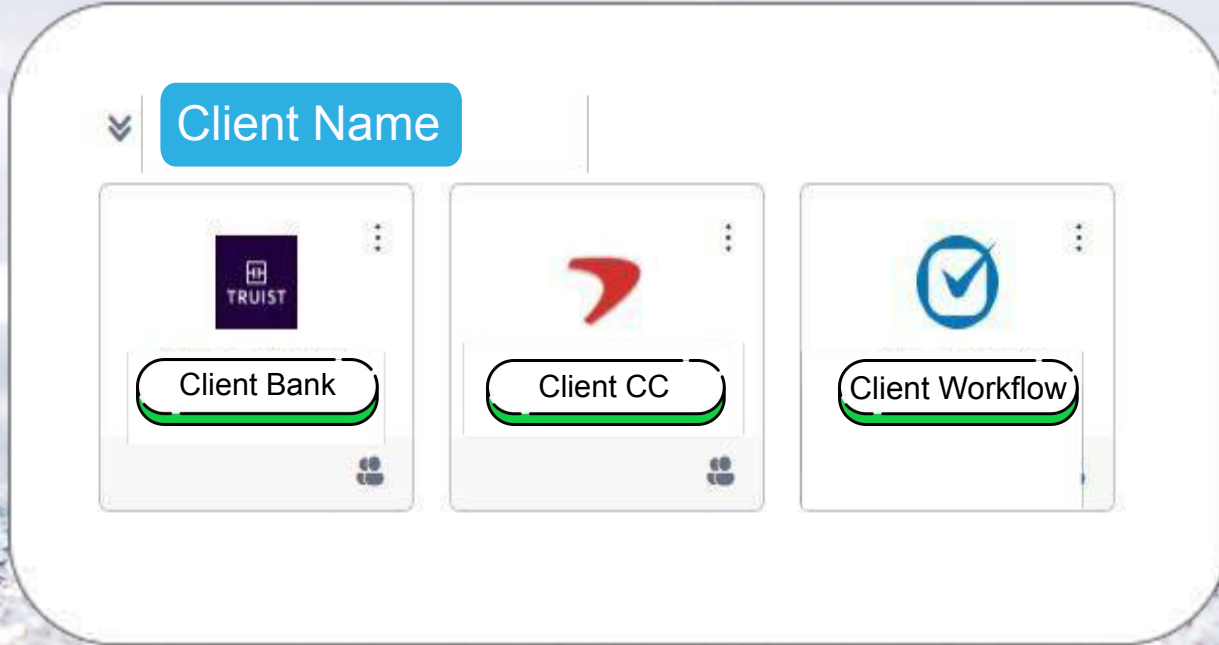
External Apps

- Mailchimp
- Canva
- Google Voice
- Stripe
- Loom
- Dubsado





Client Hub



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Upcoming Episodes

05-13-2025 Deep Dive Into Client Hub

05-20-2025 Accounting LIVE Today

06-10-2025 Xero - Ecosystem to Intro Apps

06-24-2025 SNH LIVE - My Task LMS & Xero

Deep Dive into



Client Hub

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