

The  
**'APPY HOUR**<sup>®</sup>  
with Liz & Heather  
[www.theappyh Hour.com](http://www.theappyh Hour.com)

## Firm Spotlight with PAG Fiscal Services



# Meet your Hosts

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**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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xero

# 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

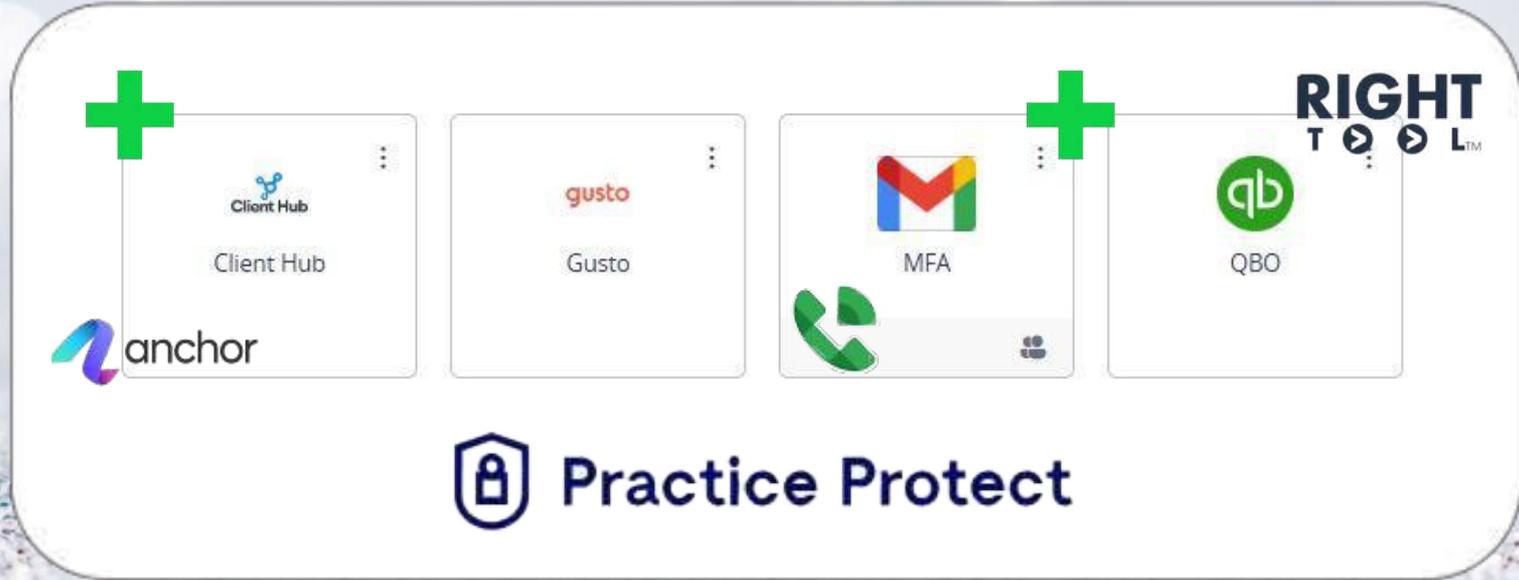


## Internal Apps

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

# PAG - Get the Work

## Done Client Hub



The image shows a mobile application interface with a white background and rounded corners. At the top left, there is a large green plus sign. Below it, there are four app cards arranged horizontally. The first card is for 'Client Hub', featuring the Client Hub logo and the text 'Client Hub'. The second card is for 'Gusto', featuring the 'gusto' logo and the text 'Gusto'. The third card is for 'MFA', featuring the Gmail logo and the text 'MFA'. The fourth card is for 'QBO', featuring the 'qb' logo and the text 'QBO'. To the right of the QBO card, there is a logo for 'RIGHT TOOL™'. At the bottom center, there is a large blue shield icon with a white padlock, followed by the text 'Practice Protect'. The 'anchor' logo is visible in the bottom left corner of the app screen.

# Client Hub

2.Company Apps (9)

 AMEX	 Google Super Admin	 Ameris Bank - PAG	 Wings FCU
-------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------

 Godaddy	 Chase	 Google Workspace	 Fidelity
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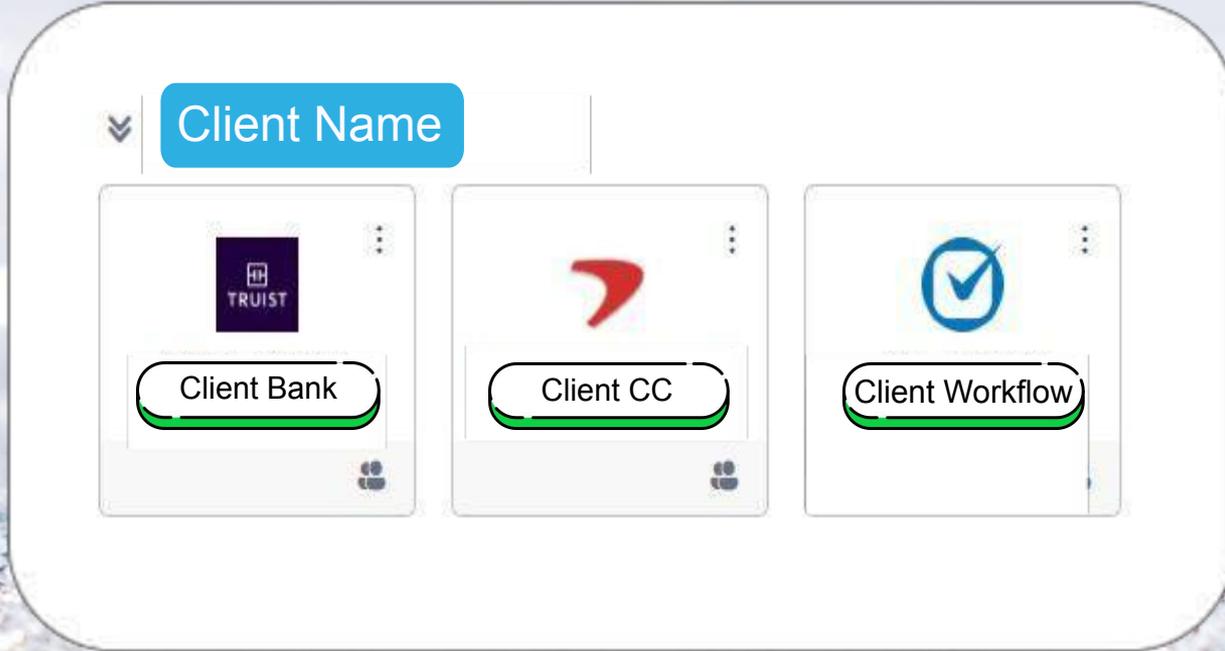
## External Apps

- 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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May 13th, 2025 4:00 PM EST