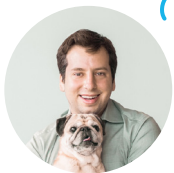




CPAS &
ADVISORS

BNA is a platinum Xero partner with a platinum offering



Jason Ackerman

CPA at BNA CPAs & Advisors

Level up

BNA CPA & Advisors (BNA) is based in Rock Hill, SC and became a partner of Xero in 2013. In 2016 BNA won Xero's prestigious Emerging Partner of the Year award. The firm reached platinum status with Xero in 2022.

BNA is a tax advisory firm that focuses on high net worth individuals and professional service businesses, including those in real estate. The firm uses Xero to provide clients with proactive advisory services. When it comes to offering innovative client services across real estate and multiple entity businesses, BNA knows best.

Jason Ackerman, Vice President of BNA, has been a supporter of Xero since 2013. He believes that Xero is the best fit for real estate and multiple entity businesses.

BNA believes that Xero is the most efficient cloud accounting software for reporting, and its usability makes it easy for non-accountants to understand and use. Xero also makes it easy to switch back and forth between different entities in the app - perfect for multiple entity businesses.

“Xero connects with reporting APIs such as Fathom and Spotlight to aggregate or consolidate information. You can also copy chart of accounts and reports between entities, so you can have standardized reporting. And because you have access to it at all times, your information is secure and backed up better. That’s why we’ve been in the Xero game for a long time.”

The best for both worlds

Xero's suite of features makes it easy for Jason and his team to set up new real estate entities quickly and efficiently. In addition to the ease of working online and access to customized reports, third party integration, and secure and automated systems, there's also Xero's award-winning beautiful interface.

With everything in one place, keeping track of a client's income and expenses is surprisingly easy.

“We want our clients on Xero's cloud system because we don't want to deal with backups, going back and forth with different versions of accounting files. You can get the numbers faster, reconcile faster and help with tax and cash flow projections faster. Xero is the best accounting system for that.”

Since converting, BNA's clients have been able to receive timely customized reports on their multiple businesses, with a clear view of their numbers from the comfort of their phone. Now with such a wide array of data so readily available, business owners and their advisors can get ahead of the curve.

A successful conversion

When it comes to the conversion process, the support from both Xero and integrated conversion apps made it a seamless transition. It's also a great way to both build relationships and learn more about the diverse range of Xero features. BNA are no strangers to the conversion process, which is why they're happy giving their stakeholders the push to make the change.

“Our firm has dedicated Xero account managers, so we have people that can help us with a conversion, which saves us a bunch of time.”

With Xero's ecosystem of over 1,000 connected apps, almost every industry is able to integrate the apps they use for their business to Xero. The access to third party integrations also makes it easy to manage multiple entity businesses from one place. When it comes to making the change to Xero, the benefits are infinite.

“It's way harder to mess up a Xero file than it is with other accounting software. And if a client does screw up a file, Xero is much easier to fix than its competitors. Because we can link Xero to your bank and credit cards, Xero is going to save a client a lot of time.”

So whether a client is looking to streamline their business, save time, or to just get more out of their day, turn to Xero.

“It's very easy to get where you want and what you need from Xero. Our firm is all in on Xero.”

Jason and BNA made the move to Xero ten years ago, and it was the best decision they made to help their firm see steady and continuous growth for an entire decade.

