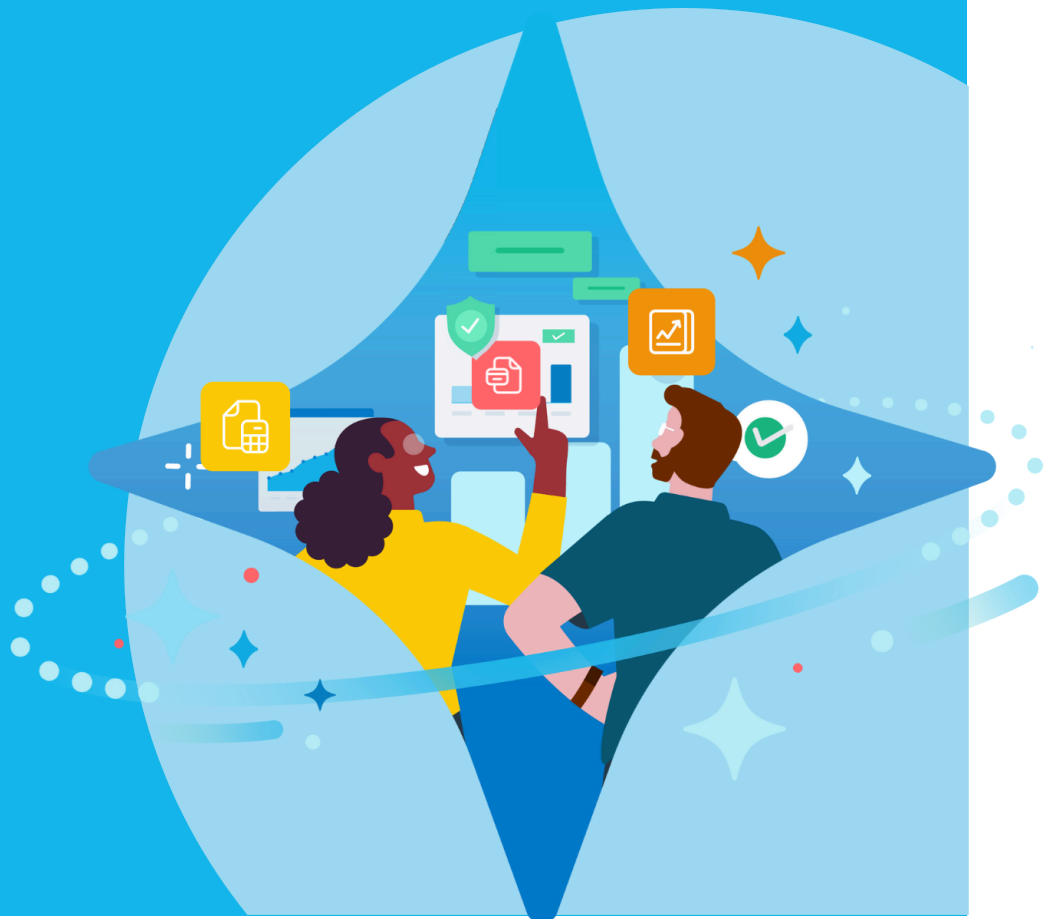




# Work smarter in FY25 with an advisor app stack

Add connected apps in key areas of your practice to help make this financial year your best yet.



# Why an app stack?

**App stack (noun).** A combination of apps that connect with Xero, allowing you to run your whole practice more efficiently with integrated data.

Every accountant and bookkeeper is familiar with the tax time rush, and more often than not, the tax time headache.

That's exactly why the beginning of a fresh financial year is the perfect time to bring in powerful apps that automate your admin, surface the data you need and help you deliver clients what they need quickly and securely. Setting up apps that connect to Xero in key parts of your practice is easier than you think, and we're here to guide you through each step.

And reports show, powering your practice with connected apps pays off.

**81% of practices that use 5+ apps that integrate with Xero experienced revenue growth in the last 12 months.\***



\*State of the industry special report, Leveraging the app advantage, 2024

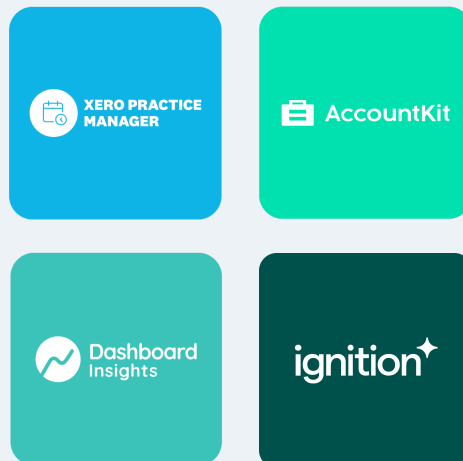
Although Xero reviews each app in the Xero App Store, we can't give any guarantees. It's up to you to assess the performance, quality and suitability of any app before going ahead.

# Practice management

Lay the foundation for a smooth-running practice with apps designed to power your work. Reduce your admin workload, streamline workflow and focus more time on delivering optimal client experiences.

## What are some of the features?

- **Xero Practice Manager.** Power your practice with one system made to work as the core of your practice and integrate with all Xero add-ons and over 30 apps. Manage your business from Xero Practice Manager, knowing its two-way sync with apps keeps it as your source of truth.
- **Automated workflows.** Automate your Xero Practice Manager tasks and workflows with powerful automations from apps like Ignition and AccountKit.
- **Uncover deep practice insights.** Understand your practice performance at a glance with Dashboard Insights deep integrations with Xero and Xero Practice Manager. Link your client, costing and staff data to live dashboards to spot trends in seconds.



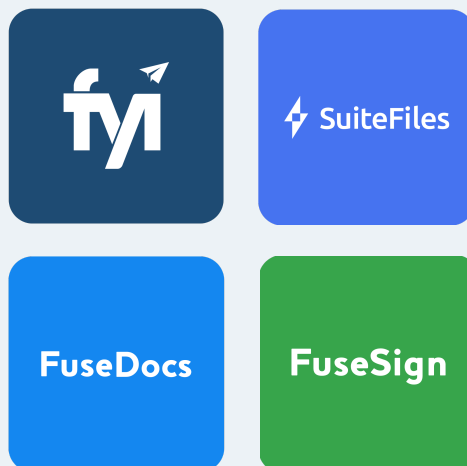
[Explore practice management apps](#)

# Document management

Delivering more work for your clients can quickly mean more paperwork. Ditch inefficiencies with document management apps made to help manage client communications, send and store important documentation and streamline the collaboration from day one.

## What are some of the features?

- **Automate repetitive document tasks.** Help slash hours spent setting up engagement letters, document packs or filling in client details. Set your repetitive tasks to autopilot and automatically extract client or entity data to be filled in for you.
- **Secure document signing.** Fast-track the signing process with secure electronic signatures that don't rely on passwords. Send document bundles through email or SMS and be updated when clients have signed to move processes along sooner.
- **Communication management.** Collaborate with your team and clients from one single platform. Sync contacts, send emails, approve documents and record meetings to move jobs along without a hitch.



[Explore document management apps](#)

# Compliance needs

Keeping up with compliance requirements is a non-negotiable for any practice. Make light work of your mandatory compliance tasks with apps made to simplify the process for you and your clients.

## What are some of the features?

- **Automated tax document processing.** Integrate directly and securely to the ATO to process, check and distribute ATO documents without a hitch. Match ATO documents to client's details in Xero, redact TFNs and retrieve tax return estimates in a snap.
- **Handle SMSF securely.** Handle self-managed super funds with the utmost compliance. Get funds ready for audit with compiled workpapers, fund filtering to identify potential compliance breaches and automatically generate tax components.
- **Client registration and management.** Take care of client needs, from ASIC registration through to annual reviews, and help comply with regulations at every step. Automate ASIC expiry notices and send off annual review packages on time with smart alerts.



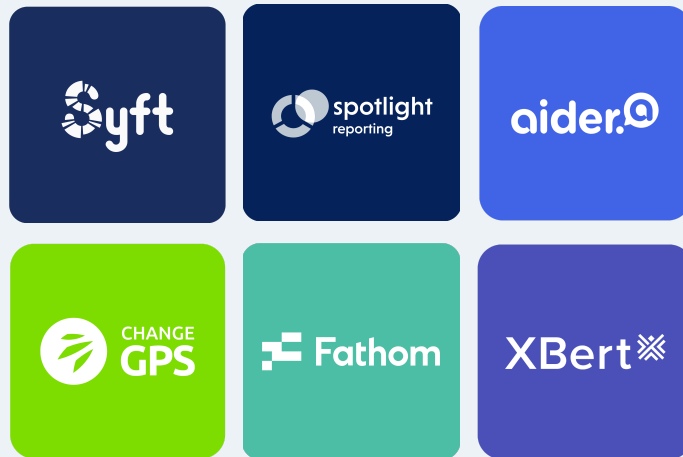
[Explore compliance management apps](#)

# Advisory services

Generate valuable insights more efficiently with apps made to surface the deep insights you need to deliver advisory services to your clients.

## What are some of the features?

- **Custom advisory reports.** Set up advisory reports on tax planning, business structures, SMSF and company dividends built automatically from client data.
- **AI-powered insights.** Supercharge your reporting and deliver more to your clients with powerful AI-driven insights. Let AI visualise data, spot anomalies and make recommendations based on your client's finances in Xero, ready for you to review in minutes.
- **Swift multi-entity consolidation.** Deliver deeper insights for complex clients without the manual work. Quickly set up reports that combine unlimited entities, fractional ownerships and currencies, all synced directly from Xero.



[Explore advisory apps](#)

# Choosing the right app

Building an app stack into your practice can benefit you and your operations in many ways, from automating manual admin work to surfacing valuable insights to offer your clients more value.

If you're not sure where to start or how to know if an app is right with you, here are **4 easy steps** to finding the right apps for your practice.

- 1. Identity your key pain points.** Where do you spend too much time? What processes could be more efficient? If you have a team, talk to them to get feedback.
- 2. Explore the Xero App Store.** The [Xero App Store](#) is designed to help you easily find apps that are relevant to your practice quickly. Visit the '[Build your practice app stack](#)' page to find details on apps that could suit your practice and its needs best.
- 3. Talk to the experts.** Make sure you're taking full advantage of the apps you're interested in. Reach out to your Xero Account Manager or the provider directly to help you get set up and take you through demo's of what you can do with each up.
- 4. Start some free trials.** Many of the apps on the Xero App Store offer free trials. Shortlist a few apps that can solve your key pain points and offer a free trial, log into your Xero account, head to the apps' listing and click 'Get this app' to get started.

**“If you're a practice that's not using apps, I would say why not? It makes our business so much more effective, productive... it's just more enjoyable.”**

**Sarah Pilling**  
Bramble & Briar



