

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us



Are your clients in need of easy tools to help them manage their finances? There are many options available. We asked some of CPA Practice Advisor's contributors, Thought Leaders, and award winners for recommendations of their favorite money management apps and have added a few of our own for your perusal.

[Mint.com](#) – CPA Practice Advisor Thought Leader and 40 Under 40 honoree Jim Boomer uses Mint.com to provide an aggregated view of all of his financial accounts.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

swears by mobile banking: “I live in the middle of nowhere so being able to make deposits from home saves me an hour of drive time.”

Credit Karma – CPA Practice Advisor Editor-in-Chief Gail Perry uses Credit Karma to access her credit score for free but the app does so much more than that. Find out what factors cause changes in your credit score and get tips on how to improve your score in many different ways. Receive alerts if your credit has been pinged or if there has been a change in your score. Credit Karma uses information from TransUnion.

Tallie – L. Gary Boomer states that “Tallie has reduced my expense reporting time by at least one hour per week.” CPA Practice Advisor Thought Leaders Tom Hood and Sandra Wiley also recommend Tallie for expense reporting.

Expensify – CPA Practice Advisor Thought Leader and Most Powerful Women in Accounting Honoree Geni Whitehouse recommends Expensify for tracking expenses. Photograph, categorize, and tag receipts, then add them to expense reports if necessary. Track distance traveled both by odometer and GPS. There is a time tracking option as well.

— — — — —

Some other apps to consider:

ReadyForZero and **SaveUp** – These two apps were mentioned in *The Economist* as solutions that help customers cut their debts with a mixture of advice and alerts. ReadyForZero helps you create a debt management program and the app helps you stay on track and pay off the high-interest debt first. SaveUp provides debt tracking and also helps you start a savings plan.

BillGuard – This app helps to protect you from unwanted, arbitrary, and questionable charges that might show up on your credit card accounts. According to

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

You set the percent you want to go to savings up to 20 percent. Recommended by Diane Wightman, CPA & Barbara Kaup, CPA, CISA, CGMA writing for the Colorado Society of CPAs, this app works in the background so saving is painless.

[Google Wallet](#) – Recommended by DigitalTrends, Google Wallet enables you to send money to any person in the US using a valid email address, track online orders, view purchase history, and spend Wallet balance as if it were a debit card.

Accounting • Financial Reporting • Software • Technology

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved