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Palo Alto Software – LivePlan

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LivePlan helps CPAs grow their accounting practice with additional service offerings. By using the best planning and financial management dashboard app with clients, CPAs can elevate their level of service to that of a strategic advisor.

LivePlan helps CPAs enhance their services with features including:

- **Easy Budgeting and Forecasting** Create budgets and forecasts quickly with LivePlan's step-by-step process. Then, use LivePlan's Scoreboard to compare the budget with actual results on a beautiful financial management dashboard.
- **Seamless Integration** Seamlessly bring your clients' QuickBooks or Xero data into LivePlan and see how their business is doing from any computer with Internet access. Never export financial data to Excel again. LivePlan automates visual reports for you and your clients with a single click.
- **Key Insights** Advise clients on their business strategies from anywhere with a simple to read KPI financial management dashboard. Industry benchmarks show clients how they compare to their competition.
- **Fundable Business Plans** LivePlan allows you to build a full lender-ready business plan or use the powerful Pitch feature to quickly and easily build a one-page business plan. Step-by-step guidance, one-on-one training, and over 500 business plan examples will help your clients build the plan they need, think strategically about their business, and get funded.

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