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## WEBCASTS

# Webinar: How Automation Helps You Build a More Scalable, Resilient Firm

Join four industry leading automation professionals as they dive into how they've used emerging fintech solutions to cut costs, improve cash flow and build more scalable, resilient firms.

Sep. 18, 2022



[View the Archived Webinar](#)

This webinar was held on Wednesday, October 12, 2022.

**Sponsor:** Corpay One

**Duration:** 1 Hour

It's no secret cash flow management is at the core of all organizations, particularly small-to-medium sized businesses (SMBs). Although going digital fuels business growth, many companies struggle to perform and adapt to new technologies.

**Join four industry leading automation professionals** as they dive into how they've used emerging fintech solutions to cut costs, improve cash flow and build more scalable, resilient firms.

You will learn that even SMBs who don't have resources or staff to be on the frontlines of tech innovation have options to automate processes like:

- OCR – document and data capture
- Paying client bills
- Creating workflows (approvals and more)
- Categorizing and coding bills and receipts
- Managing client vendors
- Issue and control smart credit cards
- Expense reimbursements

**Program level:** Basic (no prerequisites required).

**Field of Study:** Accounting and Auditing

**Presented by**



**Sharrin Fuller** is the CEO and founder of Glass Wallet and is a managing partner in multiple accounting and financial services businesses including A Simple Office Solution.

She is a prominent thought leader and speaker for fintech, small business, as well as the accounting and bookkeeping profession. She specializes in consulting on business strategy, human capital

optimization, partnerships, and entrepreneurship.

After successfully starting, scaling, and selling her accounting and bookkeeping practice, Sharrin developed the Remote Firm Scaling System and Remote Team Roadmap to help accounting firms position themselves for growth and eventual acquisition with maximum productivity from their teams.

Over her nearly two decades in business, Sharrin has also created major partnerships with payroll, timekeeping, and benefits companies. She is an ADP Advisory Board Member and has consulted with many accounting and bookkeeping practices to help them maximize their financial, operational and human resources.



**Jordan A. Goldman**, CPA, is Founder and Principal at Prime Ledger, where he provides strategic oversight and direction to ensure consistent execution and delivery of client service.

Prime Ledger was created due to a need Jordan saw in the marketplace, to shift business owners and operators into a more modern age, using new technology to create powerful back-office solutions. Jordan's passion for accounting began at a young age, driven by growing up in a family of entrepreneurs – his grandfather moved to the US at a young age and started a successful retail business, and his father has now run that business for over 30 years.

Honing his skills at Ernst & Young and Baker Tilly, Jordan is accustomed to working with business operations of all sizes. Jordan understands what organizations need to be successful and continuously uses his knowledge and experience to help small to mid-sized business owners create lasting wealth and security for their business.



**Jill Shalett** is founder of JKS Cloud Solutions and has been helping small business owners for the past 17 years. Jill's solutions are focused on cloud bookkeeping and efficient workflow solutions to get small business owners to spend less time on bill pay and more time focused on their goals, missions, and passions.



**Blake Meester** serves as the managing shareholder of Meester & Company, Inc. He works with small/medium-sized businesses and their owners leveraging technology to support the accounting and tax functions to thrive in today's competitive marketplace. Blake has led the internal transformation of the Firm from a traditional "paper everywhere" office to a paperless, technology-driven modern firm.



**Gail Perry** is the editor-in-chief of CPA Practice Advisor. A veteran of accounting journalism, she also speaks at many accounting events,

trade shows, and webinars. Gail is the author of over 30 books (including *Mint.com For Dummies*, *The Idiot's Guide to Introductory Accounting*, and *Surviving Financial Downsizing: A Practical Guide to Living Well on Less Income*), and she maintains a small tax practice. Gail is a graduate of Indiana University where she earned a bachelor's degree in journalism. She returned to school to study accounting at Illinois State University, earned her CPA, and worked for Deloitte in Chicago for several years as a state and local tax accountant. She has taught introductory accounting and personal finance courses, and she is a former computer applications instructor at the Indiana CPA Society. Gail is a member of the AICPA's PFS Credential Committee.

**This FREE online webinar is a continuation of *CPA Practice Advisor's* mission to provide unbiased, independent information on technologies available to practicing public accountants and tax professionals.**

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