

AI Meeting Accounting: *The New Era of Professional Services Automation*

DECEMBER 9, 2025

Today's *Presenters*



Lindy Antonelli
Partner

Lindy is a partner at Armanino and a leader in its midmarket cloud technology practice, with over 25 years of experience in public accounting and tech consulting. After merging her firm with Armanino in 2012, she helped establish Armanino as a Multi-Channel Strategic Sage Partner. A recognized voice in cloud technology, she is a frequent speaker at industry events, including Sage Future, CPA Society conferences, and Controllers Council events for which Lindy is also Chair of the Board.



Annie Evans
Director

With 15+ years in corporate finance, FP&A and consulting, Annie brings a positive, collaborative approach to Armanino's clients. She helps organizations leverage Sage Intacct to streamline processes, strengthen controls and deliver meaningful reporting and analytics. Her deep finance expertise and cross-industry experience—spanning construction, real estate, technology and professional services—give her a strong grasp of the challenges leaders face in today's evolving financial landscape. Across every engagement, Annie prioritizes client partnership, quality delivery and timely results.



Kelsey Campbell
Director

Kelsey is a Director in Armanino's Business Outsourcing Services practice and the co-lead of Armanino's Professional Services industry. Kelsey holds a Bachelors of Arts degree in Economics from the University of California, Los Angeles. As a finance and accounting director, Kelsey has over 8 years of experience creating efficiencies, cultivating growth, and expanding profitability within companies.

Kelsey currently oversees Armanino's Business Outsourcing Professional Services Practice where she leads the team that works with agencies, law firms, and many other areas in professional services.



Agenda



Armanino &
Professional
Services
Overview



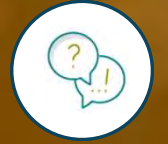
Why Sage
Intacct



Top Five
Strategies
(Deep Dive)



Live Demo



Q&A and Next
Steps

WHO WE ARE

Firm Overview



Employees
2700+

Team Members in
41 States

Firm Ranking
20th Largest

Canada
Vancouver

India
Ahmedabad
Hyderabad

California San Ramon Century City El Segundo Irvine Los Angeles San Francisco San Jose Woodland Hills	Florida Boca Raton	Missouri St. Louis St. Charles	Tennessee Nashville
Colorado Denver	Idaho Boise	New York New York City Garden City	Texas Austin Dallas
	Illinois Chicago	Pennsylvania Philadelphia Scranton	Washington Bellevue

WHO WE ARE

Firm Overview

OUR PROMISE

Armanino delivers **impactful, bold solutions** that **increase clarity and spark success** for today and tomorrow.

When it comes to your success, we know addressing today's challenges is just as important as planning for the future. Our teams bring deep industry experience to help organizations reach peak performance today, and to help you prepare for the future.

Recognition & Awards



Professional Services Industry Expertise

Armanino supports **1,350+ professional services clients**, helping them manage financial strain, think strategically, and achieve long-term success. We understand the evolving needs of service firms and provide **tailored solutions that drive efficiency, growth, and resilience.**

We collaborate with organizations in accounting, legal, human resources, marketing, publishing, and additional sectors. Our team knows firsthand the challenges these businesses face—from scaling operations to satisfying client demands—and delivers the smartest solutions to their unique tax, accounting, audit, and strategic needs.

With Armanino's breadth of audit, tax, and consulting expertise, professional services firms can streamline operations, respond to client expectations, and build sustainable strategies for the future.



KNOWLEDGE BUILT THROUGH EXPERIENCE

Professional Services *Industry Expertise*

Professional services firms face constant pressure to balance client expectations, financial management, and operational demands. Many must manage complex financial models, scale their workforce, and adapt to new technologies while maintaining high levels of service. Armanino delivers practical solutions that address these challenges directly, helping firms strengthen operations, reduce inefficiencies, and build sustainable growth strategies. We work with organizations across accounting, legal, human resources, marketing, publishing, and other specialized sectors. By combining deep audit, tax, and consulting expertise with sector-specific insight, we help firms modernize financial processes, adopt scalable technology, and create long-term resilience in competitive markets.



Law Firms



Financial Services



Life Sciences



Design Services



Education & Training



Management Consulting



Advertising, Marketing, PR



Why Armanino For *Professional Services*

Deep Industry Expertise

With experience serving 1,350+ professional services organizations, Armanino understands the unique needs of law firms, architects, consultants, and other service-based businesses.

Growth & Scalability Support

We provide strategies that evolve with your business—helping you manage growth, optimize cash flow, and implement systems that scale as your firm expands.

Specialized Compliance & Advisory

Our professionals bring in-depth knowledge of tax, audit, and regulatory requirements specific to the professional services sector, ensuring your business stays compliant while minimizing risk.

Technology-Enabled Solutions

We leverage best-in-class tools and data-driven insights to modernize operations, improve efficiency, and give you the transparency you need to make confident decisions.

Pain Points

At Armanino, we recognize that professional services firms face increasing pressure to deliver value, manage rising costs, and adapt to a rapidly evolving market. We help you navigate these challenges with tailored strategies that enhance profitability, streamline operations, and provide the insights you need to strengthen client relationships and ensure sustainable growth.



Resources & Talent Pressures

Shrinking talent pools, compressed deadlines, and high turnover limit firms' capacity to scale and compete



Compliance Complexity

Growing regulatory scrutiny and evolving ESG/sustainability expectations add cost and operational strain



Operational Challenges

Misalignment with outsourced providers and the constant need to balance billable hours with efficiency.



Evolving Client Demands

Clients expect advanced technology, real-time insights, and consistently high-value service delivery.

Choosing the Right Platform

Why Sage Intacct

- ✓ Deep multi-dimensional accounting & automation for efficient financial operations
- ✓ Multi-entity consolidations
- ✓ Only ERP Platform endorsed by the AICPA
- ✓ Sophisticated visibility for real-time decision making
- ✓ Best-In-Class, open API's for easy integration to other solutions
- ✓ Fresh & modern user interface
- ✓ Designed for finance teams looking for a powerful solution but with ease of use



Centralize Business Management in One Platform

Simplify accounting processes, expense tracking and financial reporting



Eliminate Data Re-Entry

Reduce errors and save 40+ hours per month with automated reporting



Maintain Compliance and Minimize Risk

Improve data accuracy and transparency to mitigate your regulatory risks



Integrate With Existing and Future Systems

Sync portfolio management, expense tracking and payroll systems to boost data reliability



Boost Decision-Making With Real-Time Insights

Support decisions with verified, easy-to-access data on investments, expenses and budgets



Elevate Collaboration With Teams and Stakeholders

Enhance communication with real-time dashboards that centralize operational and financial metrics

Five Strategies for Success

With Sage Intacct and Armanino as Your Implementation Partner

STRATEGY 1

AI-Powered Data *Integration*

1

Connect **PSA, ERP, CRM**
and billing systems

2

AI-driven connectors for
seamless data flow

3

Single source of truth
for financial data

4

Outcome: **Faster** audits
and **fewer**
reconciliations

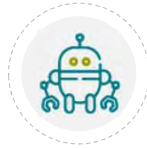
STRATEGY 2

Intelligent Time & Expense Capture

- AI-assisted time entry from calendars and transcripts
- Automated expense coding and fraud detection
- Real-time capture during meetings
- Outcome: eliminate revenue leakage

STRATEGY 3

Smart Billing & Revenue Recognition



AI-driven billing
recommendations



Automated compliance
checks (ASC 606)



Dynamic adjustments for
contract changes



Outcome: predictable
cash flow

STRATEGY 4

Generative AI for Forecasting & Advisory

- Forecast demand and resource allocation
- Predict profitability and risk
- Generate advisory insights for pricing decisions
- Outcome: Data-driven growth

STRATEGY 5

Real-Time Insights & *Predictive Dashboards*

1

AI-powered KPI
dashboards for
Executives, Managers
and PMs

2

Predictive alerts for
margin erosion

3

Drill-down to project-
level details

4

Outcome: Proactive
decision-making

Sage Intacct Roadmap

NOW / NEAR TERM 2025

Sage Intacct Roadmap Highlights

1

ENHANCED AP AUTOMATION

Extending AI across the full Accounts Payable workflow—from bill capture, coding, PO matching to payments, aimed at saving hundreds of hours.

3

CASH FLOW PREDICTION & OPTIMIZATION

Predictive forecasting of cash based on AR/AP trends, vendor payment, helping finance leaders manage liquidity proactively.

5

GENERATIVE & NATURAL LANGUAGE UX ENHANCEMENTS

Features like “Ask Sage” or context-aware natural language search and help inside the product.

2

CLOSE WORKSPACE

A centralized hub inside Sage Copilot that tracks customized close-tasks, surfaces bottlenecks and suggestions to accelerate the close process.

CONTINUOUS ASSURANCE / RECONCILIATION AUTOMATION

Features like the “Subledger Reconciliation Assistant” that monitors subledger vs GL, flags discrepancies automatically.

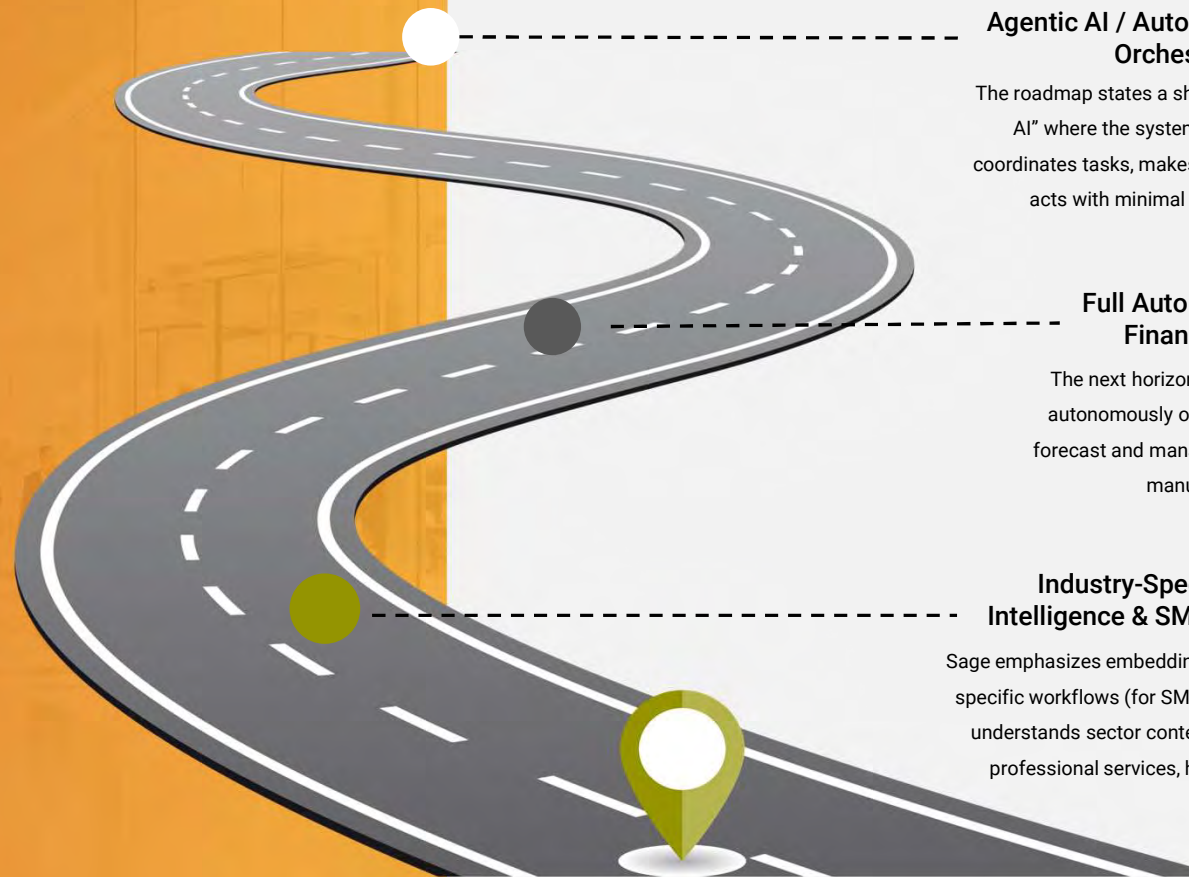
4

DEVELOPER & INTEGRATION TOOLS FOR COPILOT

Tools and APIs that allow building custom AI-driven workflows and integrations on top of Sage Copilot for Sage Intacct.

6

Sage Intacct Roadmap 2026+



Agentic AI / Autonomous Workflow Orchestration

The roadmap states a shift into "Wave 3 - Agentic AI" where the system not just assists but coordinates tasks, makes reasoned decisions and acts with minimal human interaction.

Full Autonomous Close & Finance Operation

The next horizon where the platform could autonomously orchestrate close, reconcile, forecast and manage exceptions with minimal manual intervention.

Industry-Specific Intelligence & SMB Focus

Sage emphasizes embedding deep industry-specific workflows (for SMBs) with AI that understands sector context (nonprofit, professional services, healthcare).

You Can't Spell Armanino Without "AI"

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Armanino Operates in an Alternative Practice Structure:

“Armanino” is the brand name under which Armanino LLP and Armanino Advisory LLC, independently owned entities, provide professional services in an alternative practice structure in accordance with law, regulations, and professional standards. Armanino LLP and Armanino CPA LLP are licensed independent CPA firms that provide attest services, and Armanino Advisory LLC and its subsidiary entities provide tax, advisory, and business consulting services. Armanino Advisory LLC and its subsidiary entities are not licensed CPA firms.