

Sage Intacct Advisory

The next era of partnership

Sage



High-Performance
Finance Software

POWERED BY 

The demand for strategic guidance has never been higher

The landscape for accounting practices has fundamentally changed. Many clients require more than basic compliance support and transactional bookkeeping to support their growing businesses. Increasing consolidation and accelerating regulatory changes have also introduced new competition and compliance-related complexities.

As demand for strategic, insight-led advisory services accelerates, your firm has a greater opportunity to grow its practice and play a more critical role in client success. Delivering advanced reporting and real-time financial insights enables you to expand services and increase revenue through every stage of their journey.

Yet many firms remain constrained by manual processes, fragmented systems, and compliance-heavy workloads, which limits their ability to scale advisory services and fully capitalize on this opportunity.

To scale your expertise, support more clients, and operate as a true growth engine, you must shift to a service-led advisory model powered by AI—and the partnership behind your firm must evolve with you.



Welcome to Sage Intacct Advisory

Our industry-focused workflows and AI-powered capabilities deliver a full range of advisory services—no matter the size, stage, or complexity of your clients.

We provide the service-led framework you need to elevate how you build, manage, and deliver your advisory services. By enabling your team to step away from manual workflows and deliver more of the strategic guidance your clients demand, we help your practice expand its advisory services and better support growing businesses.

Powered by Sage Intacct, we deliver a more structured and scalable approach with built-in authentic intelligence and automation. By simplifying client migrations, reducing manual tasks, and proactively surfacing trends and anomalies, we drive efficiency with AI-powered capabilities that serve as the engine for your practice's transformation to grow with your clients.

Our program is purpose-built to meet the evolving needs of outsourced accounting and finance firms through three core pillars: **trust, transform, and scale.**



Trust

Rely on a program built on credibility and compliance tailored to your needs.

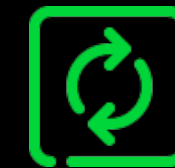
To form a true strategic partnership, your foundation must be flawless. Backed by over forty years of industry experience, Sage Intacct Advisory leverages a technology stack built by accountants, for accountants. With superior, enterprise-level risk management capabilities and flexible, modular, AI-powered workflow solutions designed around the services you offer, you'll have the rock-solid reliability you need to scale.



Officially endorsed and preferred by AICPA
for over 15 years



Proven reliability and consistent service
with a guaranteed 99.8% uptime SLA



Audit-ready workflows to help cut audit prep time by up to 50%



Ranked among the best software by G2 in 2026,
including Top 50 in Accounting & Finance Products
and Top 25 in Non-Profit Products



Transform

Drive client growth and supercharge revenue with industry focus and AI-powered capabilities.

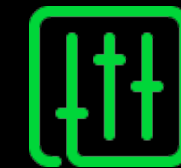
Stop reactively managing data and start leading with real-time insights. Leverage automation with pre-defined dimensions, workflows, and dashboards for industry-focused specialization to level up your services and shift from transactional tasks to delivering strategic client outcomes. Armed with financial and non-financial insights that provide a holistic view of performance, you'll attract higher-value engagements and clients with more complex requirements.



AI-driven workflow automation to reduce process cycle times by up to 80%



90% reduction in manual reconciliations to increase your team's bandwidth



AP/AR automation equipped with embedded payments and predictive insights



350+ integrated apps to support your clients' industry-specific workflows



Scale

Leverage intelligent finance that drives efficiency and scales with your firm and your clients.

Driving growth shouldn't require a mandate to grow your headcount. By reducing manual efforts with AI-powered capabilities that support an increasing client volume, your firm can maximize productivity and profitability. Protect and grow client relationships while reducing churn thanks to flexible, future-proof finance workflows that scale with their evolving needs.



Fast client onboarding with AI-powered data migration, templates, and implementation support



Automation and real-time, AI-driven insights to increase operational efficiency



Centralized client management workspaces for visibility, control, and tailored insights



A unified tech stack to eliminate inefficiencies from managing fragmented systems

A customer-centric tech stack: Powered by Sage Ai

Authentic intelligence powers the new era of advisory. Purpose-built for finance professionals on licensed AICPA standards, Sage Ai not only automates, but anticipates, advises, and assists your team. By handling autonomous workflow orchestration and surfacing real-time anomalies, it helps accelerate your shift from reactive compliance to proactive, high-value advisory services. With Sage Ai seamlessly embedded, our flexible, modular solution enables you to build and align your technology stack with your firm's specific advisory services so you can deliver a comprehensive customer experience.



A trusted digital coworker designed to elevate, not replace, your expertise:



Sage Copilot: Generative AI with natural language processing, built in partnership **with the AICPA**



Agentic AI: Advanced, autonomous workflow orchestration to eliminate manual redundancies



The AI Trust Label: Embedded safeguards providing confidence in transparency, data privacy compliance, and bias prevention

Validate your firm's growth with impactful ROI

The bedrock of a successful strategic advisory service practice is a platform that performs consistently. Outsourced accounting and finance firms leveraging solutions powered by Sage Intacct successfully convert time savings into new revenue generation.

- **40%+ time savings** on financial close
- **70% fewer reporting errors** due to anomaly detection

75%

**of finance
departments**

reported improved accuracy and
compliance using Sage Intacct

Step into the next era of partnership today

Authentic intelligence powers the new era of accounting. Purpose-built for finance professionals on licensed AICPA standards, Sage Ai not only automates, but anticipates, advises, and assists your team. By handling autonomous workflow orchestration and surfacing real-time anomalies, it helps accelerate your shift from reactive compliance to proactive, high-value advisory services. With Sage Ai seamlessly embedded, our flexible, modular solution enables you to build and align your technology stack with your firm's specific advisory services so you can deliver a comprehensive customer experience.

Ready to evolve your practice? Reach out to your Channel Executive today to discover how Sage Intacct Advisory becomes the engine for your firm's transformational growth.

[Learn More](#)



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