



HOME RUN HAPPY HOUR

**Meet The Team Brolin Starting Lineup
MVPs Inside the Exhibitor Hall**

See the Starting Lineup in Action

canopy Liscio SmartVault

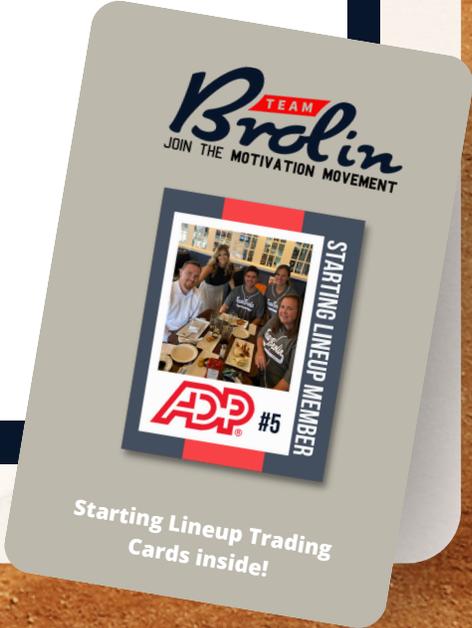
bookkeep™ ADP veem®

intuit quickbooks. Lacerte®

SWIZZNET® Jirav
HOSTED ACCOUNTING SOLUTIONS

FISHBOWL truly financial

Clip & Collect Cards Inside



TEAM
Brolin
 JOIN THE MOTIVATION MOVEMENT

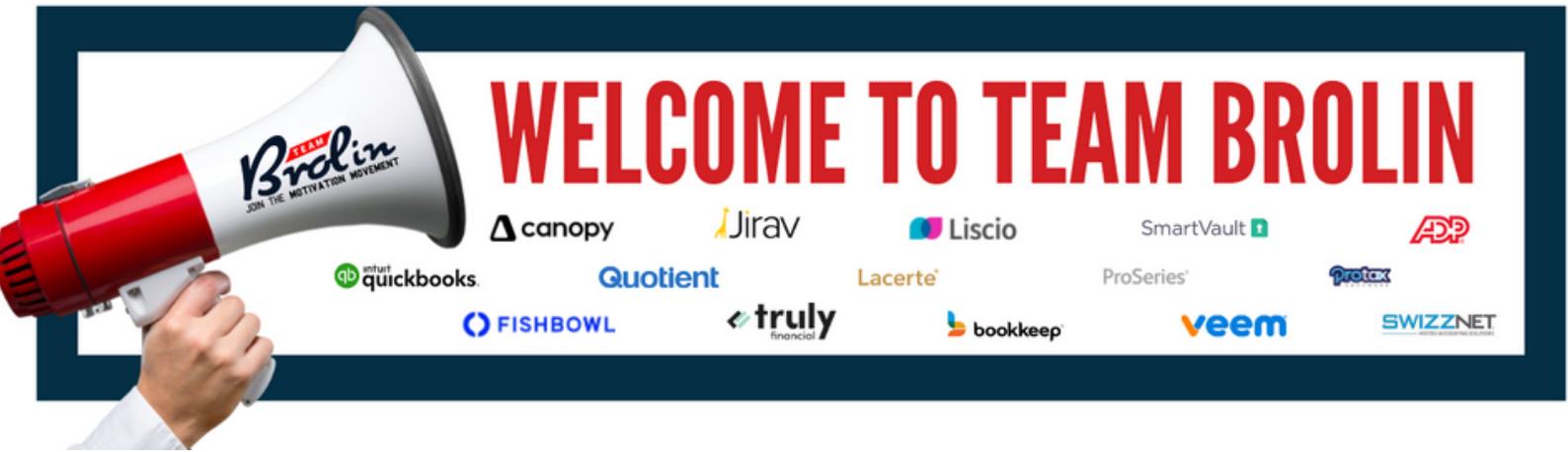
HOMERUN TECH STACK



STARTING LINEUP

Playing on **truly** financial Field

1.	Practice Management / Workflow	First Base	canopy
2.	Client Management	Pitcher	Liscio
3.	Document Storage	Catcher	SmartVault
4.	Automated Accounting & Reconciliation	Second Base	bookkeep
5.	Payroll Processing	Short Stop	ADP
6.	Online Payments	Third Base	veem
7.	Accounting Software	Right Field	qb intuit quickbooks
8.	Tax Software	Left Center	Lacerte [®]
9.	Inventory Management	Left Field	FISHBOWL
10.	Hosting & Cybersecurity	Right Center	SWIZZNET HOSTED ACCOUNTING SOLUTIONS
11.	Quoting	Pinch Hitter	Quotient
12.	Financial Planning & Analysis	Extra Fielder	Jirav
13.	Time Tracking	Infielder	qb intuit quickbooks



Hello everyone!

I am excited to introduce you to the **2022 Team Brolin Home Run Tech Stack!** These are the solutions I use for maximum productivity and profitability in my firm.

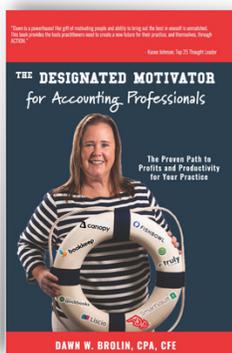
My philosophy is simple: The integration of the solutions you work with is absolutely essential. These apps are really operational assets for your firm. Softball coaching and strategy offer the perfect analogy for how technology should serve you. Here's a brief overview of the positions on a softball team so you can begin to see that softball is more than a cute theme I use....it really is key to how I have built a highly profitable firm that I actually love!

Think about it this way:

In softball, you have positions on your team that you have to fill. In addition, you have players that you need to recruit to fill those positions. Let's stick with the defensive side of the game: You have a pitcher, catcher, first baseman, second baseman, third baseman, shortstop, left fielder, center fielder, and right fielder.

As a coach, you need to know what the positions are, and you need to seek the most talented players to fill those positions. From an accounting practice perspective, the game really is no different. You have certain positions to fill in order to run your firm and to complete client work. Every accounting firm has some positions that are necessary no matter what you provide for services. Then there are the tools you need that are specific to the services you provide. This is what the Team Brolin Starting Lineup is all about.

Check out these Team Brolin Starting Lineup Member snapshots below and a DawnBrolin.com, then join Team Brolin to access free resources (including a digital copy of The Designated Motivator for Accounting Professionals!) as a Rookie member to learn how to use technology to maximize profit and productivity plus much more!



"Use the Team Brolin Starting Lineup softball strategy to increase firm profits, create tech stack ROI, and build a firm you love."

Dawn Brolin

Dawn Brolin, CPA CFE, The Designated Motivator for Accounting Professionals



Ace Your Practice Management!
Learn More About Partnering with Canopy

Canopy provides a customizable practice management platform that supports your practice as you need it. You can start with Client Management as your foundation and go from there. Maybe you don't need every module right now, but if (see also: when) you do, we make it ridiculously easy to add them on to your existing Client Management foundation.

Plus, their Tax Transcript Tool is absolutely fundamental for anyone with tax clients! Learn more about Canopy [here](#).

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Active Tasks (48) - [View More](#)

Status	Task Name	Task Type	Contact
Needs review	Are you still banking with Wells Fargo?	Client Request	Stephan
In progress	2018 Monthly Business R...	Task not submitted	Olga, Jul
In progress	Abandon and retry	Task not submitted	Abraham
With client	Did you have a new baby in 2020?	Client Request	Stephan
Needs review	Test 8879 Signature	eSign Request	Michael
Not started	Submit return	Task not submitted	Abraham
Not started	Some kind of task, input	Task not submitted	Abraham
Not started	Use check book	Task not submitted	Abraham
With client	eSign request: IRS Form 1042-pf	eSign Request	Stephan
With client	Did you purchase a home in 2020?	Client Request	Stephan
Not started	New task	Task not submitted	Barbara
Not started	Test	Task not submitted	A-P&L J
Not started	Parent task gone	Task not submitted	Abraham
Not started	New task	Task	Abraham
Not started	1042 Return	Task not submitted	Abraham
Not started	1042 Return	Task not submitted	Abraham
Not started	1042 Return	Task not submitted	Abraham
Not started	1042 Return	Task not submitted	Alexis, R
Not started	1042 Return	Task not submitted	Alexis

canopy #1

STARTING LINEUP MEMBER



The Missing Key in Your Client Experience?
A Partnership with Liscio

Liscio is a secure, quiet, organized space for clients to communicate with me (and vice versa) I can now CHOOSE when I answer a client's communication. The app lets me know what has been answered and what is still outstanding. Client-facing tasks keep them on track. And they can use the integrated mobile scanner to send me the documents we need quickly (kind of like depositing a check securely using a banking app!)

We love Liscio and our clients love it, too, Liscio fills the client experience position in my Starting Lineup and it may just be the missing key for you, too! Learn more about the Liscio client experience [here](#).

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This is how clients want to work.

Liscio #2

STARTING LINEUP MEMBER

SmartVault

SmartVault Hits a Homerun with Secure and Seamless Document Management

I have used SmartVault for over 10 years and it truly is a must-have solution for me. It keeps my practice running securely, 24/7, "no matter what." and also integrates with so many of the other solutions in my Starting Lineup from my practice management and tax solutions and beyond.

SmartVault also enables a remote work structure with controlled access, a completely customizable file structure and the security every firm needs. Learn more at SmartVault.com.



The Smart Way to Automate Learn More About Partnering with bookkeep

There are two things which most of us value highly: accuracy and saving time. Bookkeep, gives you both through daily bookkeeping automation for any platform your clients want to use. The goal is to make sure you have the confidence and peace of mind you deserve.

Bookkeep is an automated solution that eliminates the hassle of managing manual data entry solutions or resources. Improve your CAS department's efficiency, lower costs, reduce mistakes, and speed up the end of month close through smarter bookkeeping automation. No more wasting time on manual reconciliations or adjustments. Learn more at Bookkeep.

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SmartVault  #3

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Get in the Game with ADP!
Learn More About Partnering with ADP

Team Brolin is super pumped to have ADP as an integral part of the Starting Line Up in Dawn's Home Run Tech Stack. One of the key reasons? ADP Accountant Connect!

ADP Accountant Connect lets Dawn outsource her clients' payroll without sacrificing control, and the ADP Accountant Revenue Share Incentive Program provides her with ongoing revenue to compensate for whatever time she dedicates to it. Learn more about partnering with ADP [here](#).

STARTING LINEUP MEMBER



Make Payments Faster Across the Globe!
With the Veem Team!

Veem is an all-in-one AP/AR solution that offers the next generation of financial tools to accountants and bookkeepers, simplifying processes and helping their business grow. I love the Veem Team!

For starters, you can manage your client's domestic and international payments using your accounting platform as the source of truth. It's simple, seamless, and best of all it doesn't cost us a dime! Plus, Veem is trusted by more than 500,000 businesses in over 100 countries to send and receive money globally. Veem is licensed and regulated in each country and state it serves. Learn more about Veem [here](#).

STARTING LINEUP MEMBER



Organize Your Books

Learn More About Partnering with QuickBooks

If a potential client comes to me, and their primary pain points are about their data file reports are running slower, data seems less manageable, but they can't condense the file, I know they're outgrowing their setup.

QuickBooks Enterprise eliminates these kinds of growing pains because it gives a business space for a combined million customers, vendors, and inventory items. It provides breathing room and room to grow. Plus, it's all part of the QuickBooks family, which is the backbone of our bookkeeping and accounting system. Check it out [here](#).



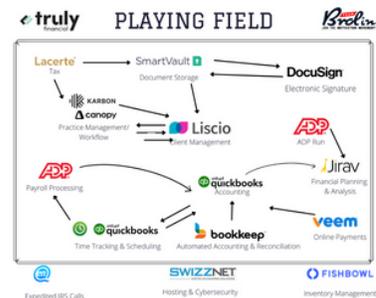
STARTING LINEUP MEMBER



Complete Returns More Efficiently with Lacerte for Tax Preparation

Did you know that Lacerte integrates with more than 32 time-saving tools in its platform? That's why it's a core part of the Team Brolin Starting Lineup! There are many tips and tricks that you can use to eliminate steps and redundancy in your workflow with Lacerte when it's integrated with SmartVault, especially.

Take a look at your tax workflow and you'll get more time back to serve more clients and scale your practice—and hopefully even scale back the number of hours you have to be at your desk! Learn more about [Lacerte](#) [here](#).



STARTING LINEUP MEMBER

FISHBOWL

Streamline Your Inventory!

Learn More About Partnering with Fishbowl

Fishbowl has been the #1 inventory management add-on for QuickBooks for over a decade, therefore a valuable asset to the Starting Line Up in my Home Run Tech Stack.

While I don't have clients with inventory or manufacturing in my own practice, I have worked with hundreds of clients who do, and I know they will always be in the best hands with Fishbowl!

Take a peek inside Fishbowl [here](#).

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FISHBOWL #9

The graphic features a man in a 'Team Brolin' baseball jersey standing in front of a glowing blue Fishbowl logo. Below him is a screenshot of a 'HOME RUN TECH STACK' with a 'STARTING LINEUP' table. The table lists various software tools and their categories.

Category	Tool	Tool	Tool
Accounting	QuickBooks	NetScout	NetScout
Inventory	Fishbowl	NetScout	NetScout
CRM	NetScout	NetScout	NetScout
Marketing	NetScout	NetScout	NetScout
Productivity	NetScout	NetScout	NetScout
Security	NetScout	NetScout	NetScout
Compliance	NetScout	NetScout	NetScout
Reporting	NetScout	NetScout	NetScout
Integration	NetScout	NetScout	NetScout
Support	NetScout	NetScout	NetScout
Training	NetScout	NetScout	NetScout

SWIZZNET

HOSTED ACCOUNTING SOLUTIONS

Safeguard Your Firm and Client Data **Get Obsessive Support with Swizznet**

There's no denying the facts: cybersecurity threats are real, they are increasingly frequent and sophisticated in their frequency, and they can also cause havoc in your firm's operations, not to mention the potentially devastating impact they could have on your clients.

Swizznet offers accounting firms a complete solution based on the four essential pillars of cybersecurity protection necessary to mitigate as many threats as possible, plus meeting the compliance requirements for IRS data security.

See Swizznet in action [here](#).

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STARTING LINEUP MEMBER

SWIZZNET #10
HOSTED ACCOUNTING SOLUTIONS

The graphic features a man in a 'Team Brolin' baseball jersey standing in front of a glowing blue Swizznet logo. Below him is a screenshot of a 'HOME RUN TECH STACK' with a 'STARTING LINEUP' table. The table lists various software tools and their categories.

Category	Tool	Tool	Tool
Accounting	QuickBooks	NetScout	NetScout
Inventory	Fishbowl	NetScout	NetScout
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Marketing	NetScout	NetScout	NetScout
Productivity	NetScout	NetScout	NetScout
Security	NetScout	NetScout	NetScout
Compliance	NetScout	NetScout	NetScout
Reporting	NetScout	NetScout	NetScout
Integration	NetScout	NetScout	NetScout
Support	NetScout	NetScout	NetScout
Training	NetScout	NetScout	NetScout

"SECURE HOSTING, OBSESSIVE SUPPORT AND SEAMLESS IT BUILT FOR ACCOUNTING FIRMS."
-Dawn Brolin, CPA, CFE
The Designated Motivator for Accounting Professionals

truly PLAYING FIELD

The graphic also includes a diagram showing the integration of various tools like Lacerte, SmartCloud, DooSign, and others.



The FP&A Solution!

Learn More About Partnering with Jirav

Jirav is an automated FP&A platform, if you are looking to expand into advisory services, this is one application you need to check out. I've been working with Evan from Jirav over the past few months to implement Jirav in my practice and it's been a great experience so far.

If you are serious about becoming a business advisor to your clients and transitioning your practice from transactional service provider to being a transformative business advisor, partner with Jirav to [learn more](#).

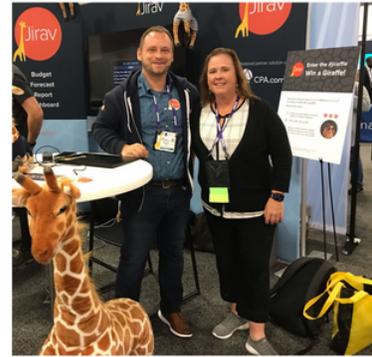


The Whole Team Plays on Truly Financial Field, Here's Why!

Partnering with Truly Financial helps you offer your clients and their customers frictionless, collaborative banking solutions anywhere in the world. Truly Financial provides accessible, all-in-one banking that gives SMBs the superpowers only larger businesses could afford.

You get multi-country corporate Visa cards, local and international bank accounts, and the ability to send or receive payments seamlessly. Dawn uses Truly Financial to help business owners grow without getting slowed down by high fees or big bank bureaucracy. See Truly Financial in action [here](#).

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 **Jirav #12**

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 **truly** #14
financial

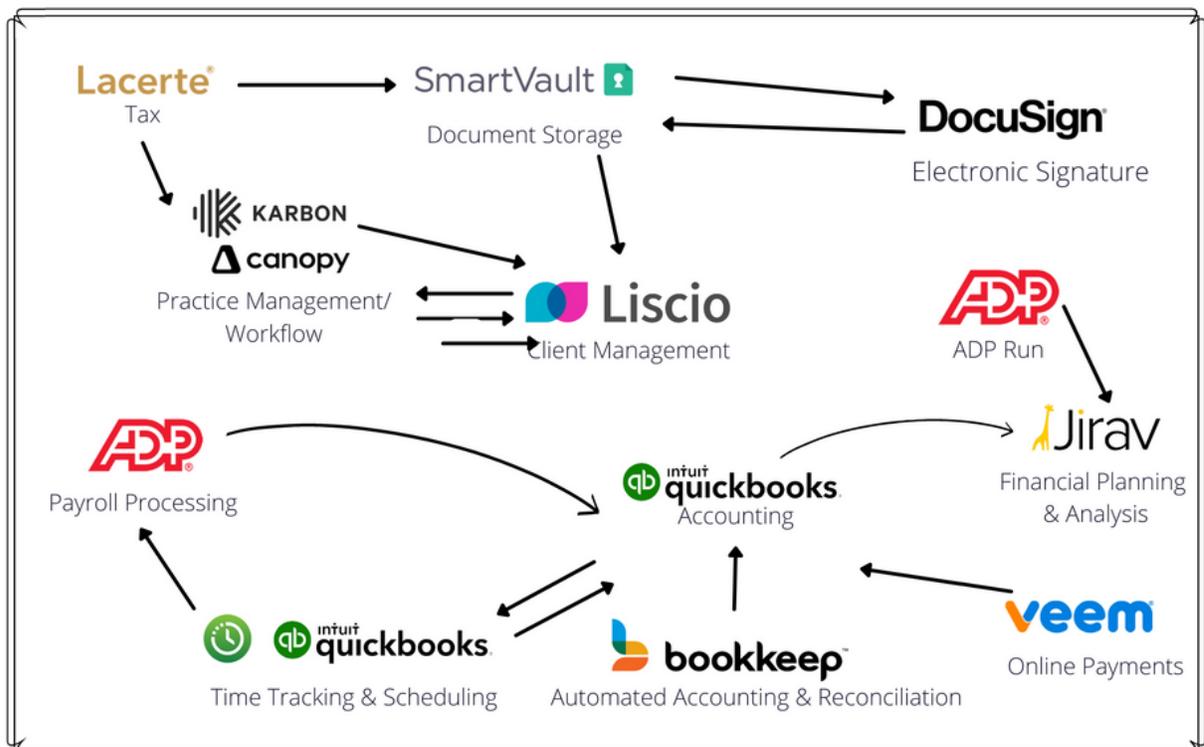
STARTING LINEUP MEMBER

HOMERUN PLAYBOOK

Win the Profitability and Productivity Game with the Ultimate Integrated Tech Ecosystem



PLAYING FIELD



Expedited IRS Calls



Hosting & Cybersecurity



Inventory Management

See the Game in Action at DawnBrolin.com

