

INTEGRATED CLIENT ACCOUNTING SERVICES

AgilLink is a secure cloud based solution that automates and scales the bill payment and client accounting functions for Business Managers & Sports Management firms.

INTEGRATED IMAGING

:: Electronically store all invoices and other important documents in the cloud. Invoice images can be attached to transactions making the approval and audit process simple and easy.



STEP 1: Ingestion -Scan and move all bills into system

CLOUD ACCOUNTING

:: Cloud based, multi-entity general ledger is built specifically for firms that service Ultra-High Net Worth clients. Integrated accounting eliminates double entry of data. AgilLink provides one integrated system for accounting and bill pay.

APPROVAL WORKFLOW

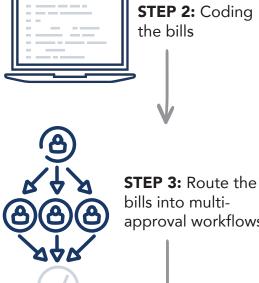
:: Configurable approval workflow with multiple levels of approvals including client approvals. Integrated with **City National Bank ensures** payments cannot be released without proper sign-off.

TREASURY MANAGEMENT

:: Our integration with City National Bank provides complete treasury management capabilities. Streamline the bank and credit card reconciliations and intra-day balances and activity means you never have to guess how much cash your clients have available.

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approval workflows



