



Practice

**Modernize practice  
management and  
unlock your team's  
full potential.**

# Firms are ready for a change

70%

of firms spend more  
time on admin than  
client service

5-7

disconnected systems are  
needed to run firm  
operations

50%

of staff time is spent  
on non-billable tasks

2-3x

higher burnout rates for  
firms with fragmented  
operations



## Not just a software decision

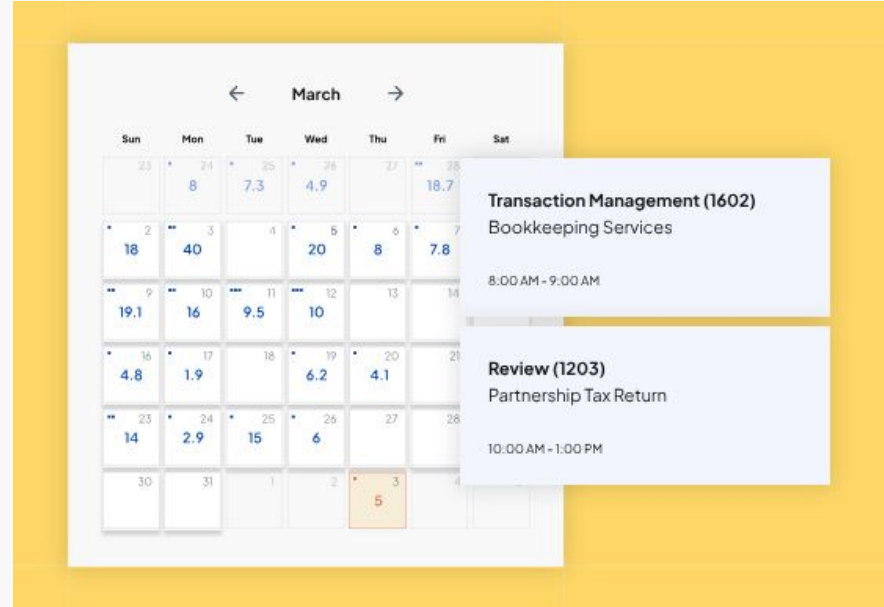
A new practice management solution impacts your entire firm. Our team of CPAs and accounting tech experts work alongside you to navigate change, align your firm, and build a more connected future.



## Time & Expense

Reduce leakage, speed up cash flow, and make it easy to track time, manage expenses, and collect faster from a single place.

- Automated time capture from Outlook
- Flexible time tracking with multiple entry options
- Time and expenses tied directly to projects and tasks
- Billable vs. non-billable tagging with tax status and budget links
- Locking controls and auto-submission

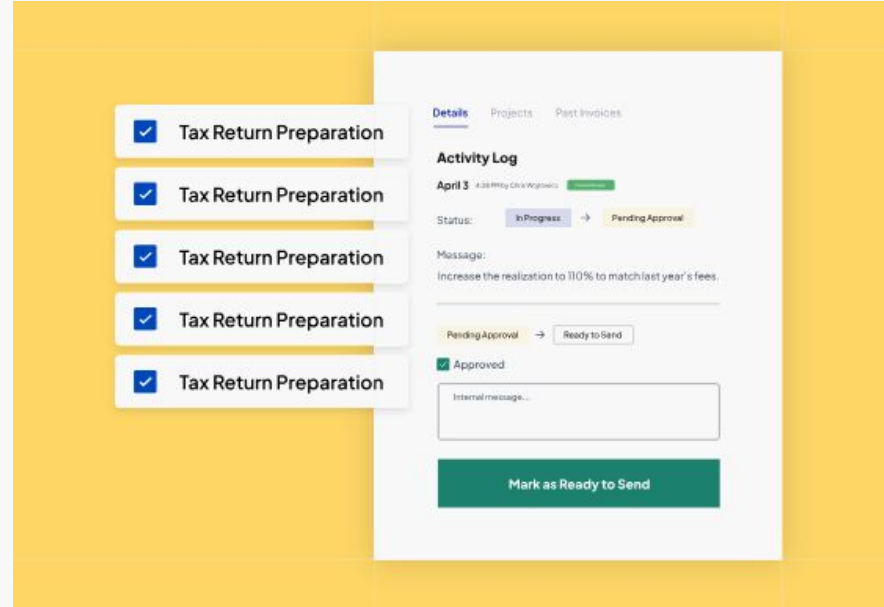




## Billing & AR

Keep teams aligned, work on track, and resources optimized – with full visibility into what's happening across the firm.

- Automated invoicing with sales tax calculation
- One-click payments and save methods
- Automated delivery, reminders, reconciliation, and aging-based follow-ups
- Custom messaging tools and smart statements
- Unified client portal for invoice viewing, payment management, and transparent interactions

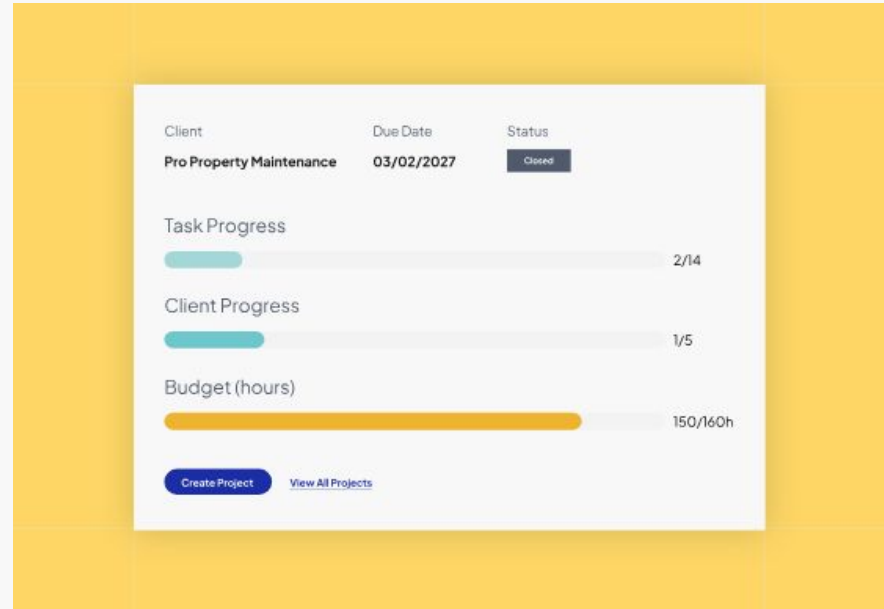




## Project Management

With a clear view of performance, progress, and people, firms have the data to make smarter decisions and the tools to deliver better client service.

- List view for all active and inactive projects
- Task automation with routing and completion workflows
- Reusable project templates with auto-populated roles, tasks, and scheduling rules
- Document sharing, e-signatures, and forms
- Flexible customization for user roles, layouts, and dashboard views





## Client and Contact Management

Build stronger relationships and deliver more consistent service with a single source of truth for all client data.

- Unified client records from PM and CRM
- Easy-to-use portal for centralized billing, document sharing, and communication
- Embedded time, task, and billing workflows
- Connected platform integrations to maintain data consistency across tools

The screenshot shows a software interface with a yellow header bar. Below it, there are two tabs: 'My Engagement' and 'All Engagements' (which is selected). To the right of the tabs is an 'Export' button with a download icon. The main area contains a table with the following columns: Engagement, Status, Minimum Price, Primary Contact, Billing Contact, and Signed. The table lists eight sample tax engagements from 2025, with statuses ranging from 'Excluded' to 'Executed'.

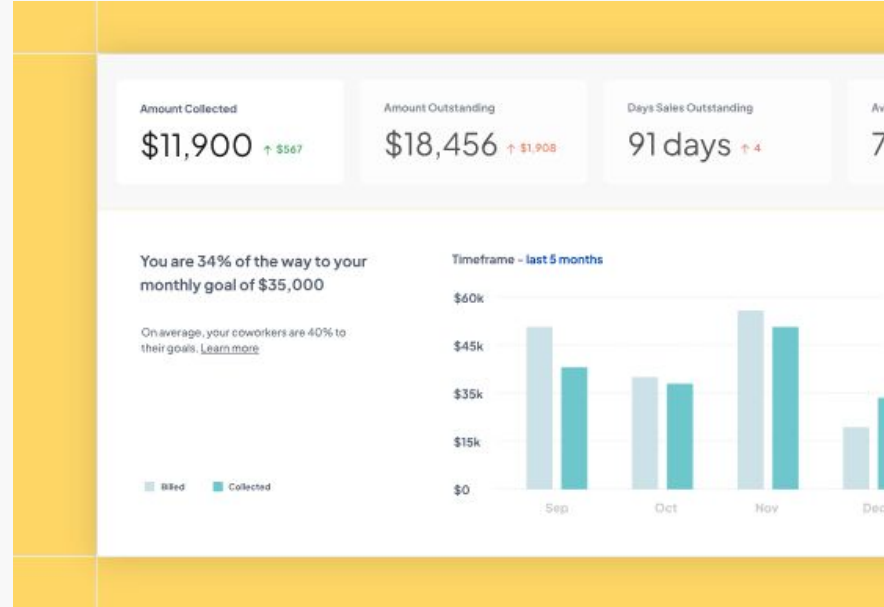
Engagement	Status	Minimum Price	Primary Contact	Billing Contact	Signed
2025 Sample Tax Engagement 21042	Excluded	\$05,000.00	Michael Scott	Angela Martin	
2025 Sample Tax Engagement 21042	Sent	\$20,000.00	Michael Scott	Angela Martin	
2025 Sample Tax Engagement 21042	Executed	\$05,000.00	Michael Scott	Angela Martin	
2025 Sample Tax Engagement 21042	Executed	\$37,000.00	Michael Scott	Angela Martin	
2025 Sample Tax Engagement 21042	Executed	\$20,000 - \$25,000.00	Michael Scott	Angela Martin	
2025 Sample Tax Engagement 21042	Executed	\$70,000.00	Michael Scott	Angela Martin	
2025 Sample Tax Engagement 21042	Executed	\$25,000.00	Michael Scott	Angela Martin	
2025 Sample Tax Engagement 21042	Executed	—	Michael Scott	Angela Martin	



## Reporting and Analytics

From financial health to team productivity, unlock the insights your firm needs to drive profitability and improve performance.

- Real-time financial data
- Advanced reporting capabilities
- Predictive analytics to forecast outcomes and identify trends
- Integration with accounting systems







## Your connected ecosystem

Aiwyn Practice brings everything – and everyone – together. Create a seamless experience across your entire firm with the tools your team already relies on.