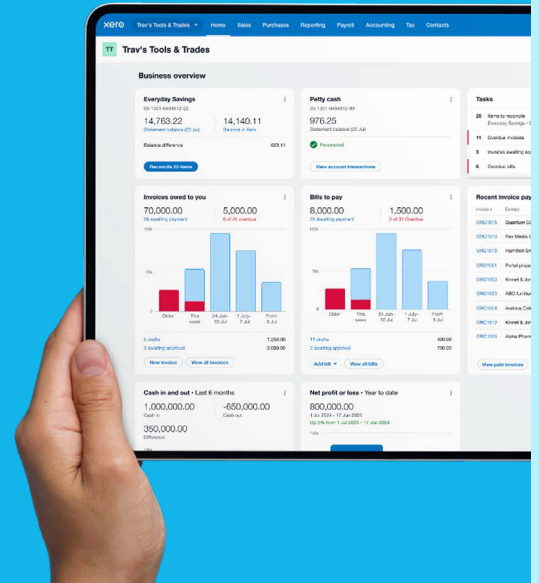




GET MORE DONE TOGETHER WITH XERO.

BUILT FOR US ACCOUNTING AND BOOKKEEPING FIRMS
- AND THE SMALL BUSINESSES THEY SERVE.



THE SMALL BUSINESS ACCOUNTING PLATFORM BUILT FOR US CAS FIRMS

Xero is the modern small business accounting platform that helps US accounting and bookkeeping firms do more advisory work with the team they already have.

- **Single ledger, single source of truth.** Collaborate with clients in real time on the same live data – no version control or file swaps.
- **AI financial superagent, JAX.** Automate bank reconciliation, workflows and client file summaries so your team spends less time on busywork and more time on advice.
- **Unlimited users, no per-seat penalties.** Add your whole team and your clients to Xero without worrying about extra license costs.
- **Deep ecosystem with Syft Analytics.** Xero connects to over 1,000 certified apps, including Syft Analytics, so you can tailor the right workflow for every US client, from early-stage to complex multi-entity groups.

WHAT US FIRMS GET WITH XERO



Connected collaboration

Work in one single ledger with unlimited users, so partners, staff and clients are always aligned on the same numbers.



Efficiency & ease

Automate data capture, bank feeds and reconciliation with JAX to save hours each week during busy season and beyond.



Insights & advisory

Use Xero Analytics and Syft Analytics to turn client data into dashboards, consolidations and forecasts that power CAS and virtual CFO services.

92%

of accountants and bookkeepers using Xero agree it makes client collaboration easier.*

Join over
250,000

accountants and bookkeepers using Xero in their practice.

Customers report
~6 hours saved
weekly with automated bank feeds and reconciliation matches.**

*Source: Xero survey of accountants and bookkeepers using Xero, conducted across Australia, New Zealand, the UK and the US, July 2025

** Source: Xero customer research on time savings from automated bank feeds and reconciliation matches, global sample of small business customers using Xero, 2024-2025

WHY XERO FOR YOUR US SMALL BUSINESS CLIENTS

Get more done, together, with your US clients on Xero.

Xero helps your US small business clients run their business, not their books – while you stay plugged into the same live data to support them.

“We’ve gotten some amazing help from partner consultants, success managers, account managers, and everybody in the entire Xero ecosystem.”

— Eric Henderson,
HighEchelonCPA (US)

FOR YOUR US CLIENTS

- **Easy to learn, easy to love.** More than 90% of customers agree Xero is easy to use, helping US clients adopt it quickly with less hand-holding from your team.
- **Time back every week.** Design and AI-powered automation help clients save around 6 hours per week on bookkeeping tasks.
- **Better cash flow control.** US clients can get paid up to 2x faster with online invoice payments and gain clearer cash-flow visibility for day-to-day decisions.

FOR YOUR US FIRM

- **Less chasing, more advising.** Real-time collaboration and automated workflows reduce the back-and-forth so you can focus on higher-margin advisory and CAS work.
- **Scale across every client with US-friendly plans.** US Business Edition and Partner Edition plans cover simple write-up clients, ongoing bookkeeping and advanced advisory, so even your smallest US clients can be profitable to serve.
- **Built for the US tax and compliance landscape.** Support US workflows like W-9 and 1099 management today, with Xero Payroll powered by Gusto and sales tax capabilities coming online as they roll out.

US INSIGHTS ENGINE – XERO ANALYTICS, SYFT ANALYTICS, & JAX

Power your US advisory and CAS services with Syft Analytics and JAX.

- **From numbers to narratives.** Xero Analytics and **Syft Analytics** turn your US clients’ accounting data into automated reports, dashboards, consolidations and cash-flow forecasts – ideal for CAS and virtual CFO engagements.
- **Included for deeper value.** **Syft Analytics is included at no extra cost on eligible Xero plans**, improving total cost of ownership and making advanced analytics accessible to more US clients.
- **JAX, your AI financial superagent.** Ask questions in natural language and get tailored insights, summaries and suggested next steps in seconds – backed by secure data and trusted sources – so you can advise faster and with confidence.



“Syft saves us 45 minutes to an hour each month for every engagement, and those gained hours are huge to a new business that is growing like ours.”

— Jarred Bailey,
Founder of RightHand CFO (US)

XERO US PARTNERSHIP AND SUPPORT

Xero partner program (US).
Training, discounts and free tools designed to grow your US firm.

Partner Central. One place for US partner resources, certifications and client insights.

Real people, real support.
US-focused partner consultants and community to help you go from onboarding to growth.