

ACCOUNTING & ADVISORY · ACCESEXL + CLAUDE

Give your accounting clients access to financial advice every day



The challenge

Imagine you're a partner in an accounting firm or a Fractional CFO, looking for ways to deliver greater value to your clients and build stronger, more enduring relationships.

You've developed sophisticated financial models that are customised for each of your key clients. These models help clients understand profitability, cash flow and the financial impact of business decisions.

However, they're complex and require a skilled accountant to operate. Your team only updates them a few times each year, meaning clients receive valuable forecasts but can't easily use the models for everyday decision-making.

You want to change that without giving clients access to complicated spreadsheets they could accidentally damage.

You have powerful financial tools, but your clients only benefit from them occasionally.

The solution: let clients chat with their financial models

You use **AccessEXL** and **Claude** to transform your existing models into secure, interactive decision-making tools.

01 Prepare client models

Your accountants create client-ready copies of their sophisticated financial models.

02 Control access

AccessEXL exposes only selected inputs and outputs, protecting the underlying formulas and calculations.

03 Connect to Claude

Each client securely accesses their own model through a simple conversational interface.

04 Explore scenarios

Clients ask questions, adjust assumptions and see the impact on cash flow, profitability and other financial measures.

05 Maintain your advisory relationship

You continue conducting in-depth annual reviews, discussing business performance and updating each model to reflect changes in the client's business.

WHAT YOUR CLIENTS ASK CLAUDE

Hiring decision

“What happens to our cash flow if we hire two additional employees next month?”

Capital purchase

“Can we afford to purchase \$250,000 of equipment without increasing our borrowing?”

Claude uses AccessEXL to run your financial model and explain the results in plain English. Clients without a financial background can ask follow-up questions without feeling embarrassed.

The results

BEFORE	WITH ACESSEXL
Forecasts updated a few times yearly	Scenario analysis available on demand
Accountants operate complex models	Clients interact through Claude
Limited client access to insights	Secure, controlled self-service
Periodic advice and annual reviews	Continuous insights plus annual reviews

Your clients gain access to trusted financial insights whenever they need them.

Meanwhile, your accountants spend less time operating spreadsheets and more time providing valuable advice.

Your annual review remains a cornerstone of the relationship, ensuring each model stays relevant as the client's business evolves.

THE KEY TAKEAWAY

You don't need to rebuild your models or develop a custom client portal.

AccessEXL turns your existing financial models into secure, AI-accessible advisory tools, extending the value of your expertise throughout the year.

Keep the financial expertise. Give your clients the power to use it.

accessexl.accessanalytic.com.au

Get started for free