

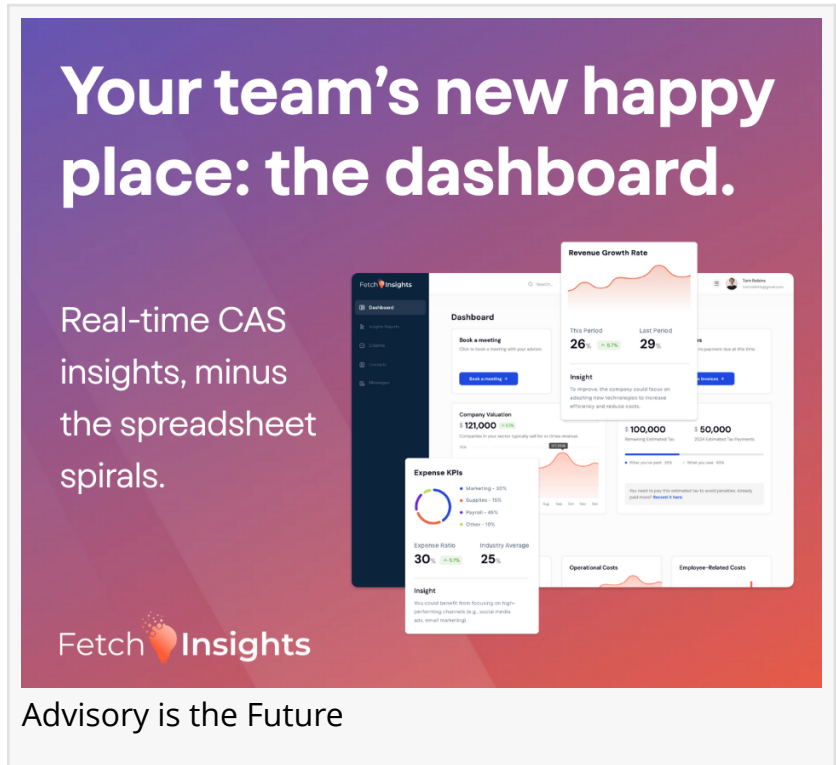
Advalis Inc. Launches FetchInsights: A Breakthrough in Automated Client Advisory Services

According to the CPA.com CAS Benchmark Survey, firms offering CAS services report nearly double the growth of traditional firms. FetchInsights can help.

WELLINGTON, KS, UNITED STATES, May 27, 2025 /EINPresswire.com/ -- Advalis Inc., the team behind the industry-leading BOI reporting solution FincenFetch, announces the launch of [FetchInsights](#), an automated solution designed to help accounting firms launch, scale, and deliver Client Advisory Services (CAS) with ease.

With CAS rapidly becoming a cornerstone of firm growth, projected to generate \$70 billion across the accounting industry, FetchInsights helps firms increase revenue and client engagement with an all-in-one platform that enables firms to provide high-impact advisory services to more clients, using fewer resources.

"After working with over 1,000 firms on BOI compliance through FincenFetch, we kept hearing: how can we offer more proactive, scalable services to our clients?" said Charles Wismer, CEO of Advalis Inc. "We designed and built the CAS solution from the ground up using real firm feedback, to make Client Advisory easy, profitable, and impactful."



Key Features of FetchInsights:

- * AI-Driven Reporting: Generate client-specific advisory reports in minutes, including cash flow forecasts, tax planning dashboards, and industry benchmarking.
- * Client Demo Generator: Show clients the value of CAS with automated "test-drive" reports and



CAS is no longer optional for firms looking to stay competitive. FetchInsights equips firms to deliver insights to help their clients grow while creating a high-margin, recurring revenue stream."

Charles Wismer CEO

dashboards.

- * Scalable Delivery: Firms can support 67–102 CAS clients with just 2–3 staff, with software automations that reduce time per report by 90%.

- * White-Labeled Dashboards: Branded portals that firms can offer clients for direct access to insights and deliverables.

- * Built-In CRM and Engagement Tools: Email campaigns, meeting scheduling, and performance tracking baked into the platform.

Why It Matters:

According to the CPA.com CAS Benchmark Survey, firms offering CAS services report nearly double the growth of traditional firms. FetchInsights accelerates this opportunity by making it easy to launch and scale new service offerings, without requiring large staffing increases or manual reporting burdens.

FetchInsights also introduces the SPRING Framework, a six-step launch strategy that guides firms through Scoping services, Planning staff, setting Rates, Integrating systems, Notifying clients, and Gauging results. This framework enables firms to go from idea to full CAS implementation in weeks.

"CAS is no longer optional for firms looking to stay competitive," added Wismer. "FetchInsights equips firms to deliver insights, not just reports to help their clients grow while creating a high-margin, recurring revenue stream."

To learn more or to schedule a demo, visit www.FetchInsights.com.

Monica Stoneking

FetchInsights

monica@fetchinsights.com

Visit us on social media:

[LinkedIn](#)

[Facebook](#)

[X](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/815522632>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2025 Newsmatics Inc. All Right Reserved.