



NEWS & UPDATES

Welcome to the Sage Intacct Newsletter from Gray, Gray & Gray, a Frazier & Deeter Company, where we provide helpful insights and information on the many great benefits of the Sage Intacct solution, and ways you can realize their usefulness.

Frazier & Deeter Establishes New England Presence with Acquisition of Gray, Gray & Gray

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We're excited to share that Gray, Gray & Gray is joining Frazier & Deeter, marking an exciting new chapter for our firm, our people and the clients we proudly serve. By joining FD, we'll continue building on the legacy we've created while gaining access to expanded resources, capabilities and opportunities to better support our clients for years to come.

Leadership at Gray, Gray & Gray highlighted the expanded opportunities this move creates. *"While we've always been proud to be an independent firm, joining Frazier & Deeter, a firm we have had a relationship with for over 30 years, is an exciting next chapter for our firm,"* said James DeLeo, Managing Partner at Gray, Gray & Gray. *"This partnership allows us to preserve our client-first approach while providing access to broader resources, expanded advisory services and new opportunities for our people. It was important to find a firm that shares our values, and we found that in Frazier & Deeter."*

[READ THE FULL PRESS RELEASE](#)

**Strategic Thinking Podcast Special Edition:
A Conversation on the Future of Gray, Gray & Gray and Frazier & Deeter**

In this special edition of the Strategic Thinking Podcast, host Bryan Pearce, Director of Strategic Business Planning, leads a conversation with Jeremy Jones, Managing Partner & CEO of Frazier & Deeter, and Jim DeLeo, Boston Office Managing Partner of Gray, Gray & Gray – A Frazier & Deeter Company, about the recently announced combination of the two firms and what it means for clients, team members, and the marketplace.

Listen or watch the full conversation below to learn more about the future of the combined firm and the continued commitment to serving clients with the same care, responsiveness, and forward-looking perspective.



[LISTEN HERE](#)

This Month's Feature Spotlight: Discover AI Agents for Sage Copilot

Take Sage Copilot to the next level with AI agents from Sage-certified partners. The new Agent Marketplace in Sage Intacct makes it easy to discover, purchase, and manage AI agents while maintaining control through role-based security and permissions.

Key benefits include:

- Browse and evaluate certified AI agents in one centralized marketplace
- Enable, manage, and monitor agents from a single administration console
- Control user access through Sage Intacct roles and permissions
- Review agent details, permissions, and support information before deployment

All marketplace agents undergo Sage's technical, security, and legal certification process, helping organizations confidently extend the capabilities of Sage Copilot. Once enabled, authorized users can access approved agents directly within their Sage Copilot experience.

Interested in exploring what's available? [Click here to learn more](#)

Smart Excel Reporting: Early Adopter Opportunity

Looking for a more flexible way to build reports with your Sage Intacct data? The new **Smart Excel Reporting** feature allows you to create reports directly in Microsoft Excel using live Sage Intacct financial data. Reports remain linked to your data, making it easy to refresh and access the latest information while maintaining Sage Intacct security permissions.

Benefits include:

- Build custom Excel reports using Sage Intacct data
- Refresh reports on demand with the latest financial information

Sage Intacct is currently accepting participants for its **Early Adopter Program**. Selected users will work directly with the Product Manager, gain early access to the feature, and provide feedback to help shape future enhancements.

Interested in participating? [Sign up for Early Adopter access today.](#)

Now Available: Sage Intacct R3 Release Notes



Sage Intacct's latest release notes are now live, delivering new features and product enhancements automatically—no action required. Be sure to review the release highlights to see what's new and how these updates can support your workflows.

[Access the release notes here.](#)

Sage Intacct Demo with Q&A



Coffee Break Demo

Learn how Sage Intacct helps you drive business performance from multi-entity consolidation in minutes to powerful, yet easy-to-use cloud budgeting and planning software.

REGISTER NOW

Sage Intacct Construction Demo Plus Live Q&A



Coffee Break Demo

Learn how Sage Intacct Construction, the only native-cloud construction financial management solution, helps manage multiple entities with ease, gain real-time insights into business drivers, and distribute environments/scalability.

Find out more about the expansion of Sage construction cloud suite with the launch of Sage Construction Management. Read the [full press release here](#) and register below for the virtual demo.

REGISTER HERE

Upcoming Event

We are pleased to announce our participation in the following event.

Diocesan Fiscal Management Conference
September 27 – 30, 2026
Omni Louisville Hotel

We are proud to be a Platinum Sponsor of the 2026 Diocesan Fiscal Management Conference (DFMC)! Be sure to visit us at **Booth #410** to connect with our team and learn how we're

helping dioceses and faith-based organizations.

We also invite you to join our presentation, "**Real Talk on Diocesan Automation: What It Really Takes to Implement and Scale Systems Across Schools, Parishes, and Ministries**," on Wednesday, September 30, at 9:30 AM or 11:00 AM.



Team Member Spotlight: Todd Donatello

Todd Donatello plays a key leadership role in our Sage Intacct & Advisory practice, guiding clients through a smooth transition from legacy accounting systems to the more powerful Sage Intacct platform.

With deep audit and accounting experience, Todd understands how the right accounting system fuels an organization's growth, and how the wrong one holds it back. He draws on that perspective, along with his deep knowledge of Sage Intacct's capabilities, to shape the practice's approach and design solutions that transform how clients manage their business.



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Under Todd's direction, the team engineers tailored accounting and financial management solutions that help clients across a range of industries put the latest technology to work. By analyzing internal processes and reporting needs, he designs and deploys customized Sage Intacct platforms that improve access to key data, add valuable analytical tools, and build in essential internal controls. Each system addresses a client's specific challenges: today's needs and tomorrow's opportunities.

Todd's expertise comes first-hand. Before joining Gray, Gray & Gray, he held financial software implementation and management roles, served as a CFO in the golf industry, and held senior audit positions at BerryDunn and Baker, Newman & Noyes. He is a graduate of [Stonehill College](#), with a degree in business administration.

Interested in learning more about the Sage Intacct Solution from
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