CUSTOMER STORY

The Advisory Advantage

How One Nebraska CPA is Reimagining Ranch Financial Planning for Mid-Sized Operations

Erin Heath
Founder
Erin R. Heath CPAs

The Challenge: Why Traditional Approaches to Farm Accounting Aren't Working

Most accounting firms serving agricultural clients operate on a reactive, tax-season-focused model. For ranchers making critical daily decisions about herd management, breeding programs, and operational investments, this approach leaves them without the financial insights they need when decisions actually matter.

Erin Heath, who owns a small cattle operation with her husband in addition to running her CPA practice, recognized this gap wasn't just frustrating her clients—it was limiting what her practice could offer. Based in Nebraska's Sandhills, she serves ranchers with pioneer roots built on hard work and optimism. *"Our advisory practice has historically not focused on extensive bookkeeping, but rather on planning,"* Erin explains. *"What intrigued me about Figured was the lifetime financial statement analysis it offers."*

But Erin's vision goes beyond just adding another tool to her practice. **She sees a broader industry problem: the lack of accessible solutions for mid-sized ranchers**.

"Many larger firms focus on bigger operations," Erin notes. "I'm interested in scalability—making this work for smaller ranches and row crop farmers."

> *I want to help mid-size/traditional livestock operations make better decisions by providing them with better information, without the high costs typically associated with comprehensive financial insights.*
>
> **Erin R. Heath**, CPA, Owner

ERIN R. HEATH
CERTIFIED PUBLIC ACCOUNTANT

THE FIRM

Name: Erin R. Heath CPA

Location: Nebraska

Services:

- Tax Planning
- Bookkeeping
- Accounting
- Estate Planning
- Payroll
- QuickBooks Online Support

THE FARM

Farm Type: Ranch

Location: Nebraska

Size: 6,600 Acres; ~400 head, embryo focus

The Vision: What Drew Erin Heath CPAs to Figured

1. Making Advisory Accessible to Smaller Operations

Traditional advisory services often price out smaller operations. Erin believes Figured can change this equation, making sophisticated financial analysis accessible to farmers and ranchers who need it most.

2. Ongoing Visibility Into Financial Health

Rather than waiting until tax season, farmers and ranchers need ongoing visibility into their operations financial health. Figured's approach to real-time data and automated reporting deeply aligns with this need.

3. A Standardized Reporting Framework

"We're increasingly handling clients' bookkeeping more efficiently than they can do it themselves," Erin explains.

> ***"Figured serves as a template for reporting—it's not just about automation, it's about having a standardized, repeatable process that works."***

4. It Fills An Industry Gap

Organizations like Ranching for Profit teach strong financial principles, but many ranchers lack practical tools to implement those principles. Erin sees Figured as bridging that gap between education and execution.

The Approach: Early Implementation of Figured

In the implementation phase with Figured, Erin is working to refine her workflows with a focus on three key areas:

Building Repeatable Workflows

Creating repeatable workflows using tools like the Allocator to automatically categorize income and expenses from QuickBooks Online, with separate Production Trackers for different herds and livestock classes.

Real-Time, Actionable Reports

Building custom report packs—including cash flow and livestock gross margin reports—that update in real-time and deliver actionable insights, not just historical data.

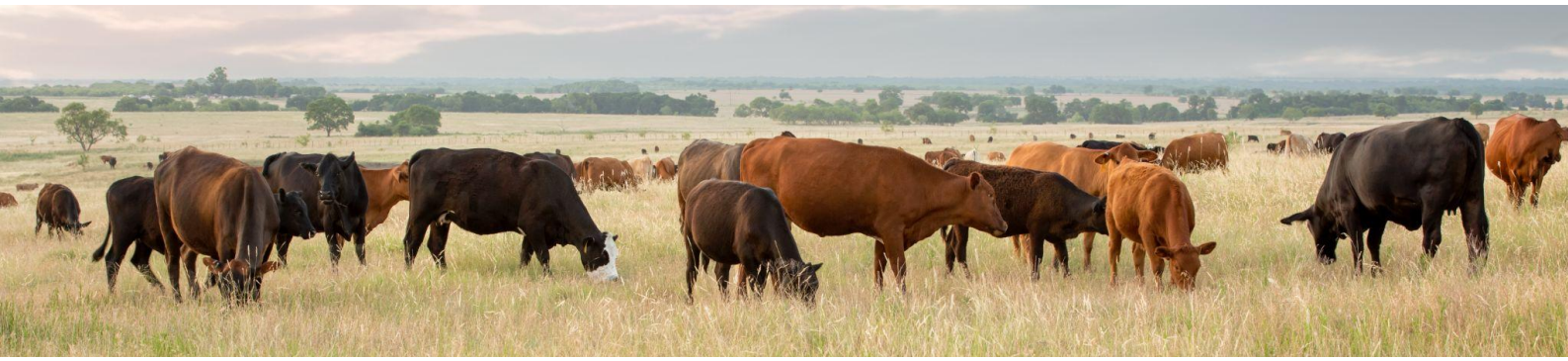
From Compliance to Advisory

Shifting the conversation from tax returns to financial strategy, helping ranchers understand KPIs like gross margin per head and using those metrics to guide operational decisions.

Client Spotlight: Putting Figured to the Test

One of Erin's pilot clients is a Nebraska ranch that runs a specialized embryo transfer program.

The ranch backgrounds heifers and implants embryos for other people's animals, receiving payment for the use of their cows—a high-value operation that requires precise financial tracking.



Rather than just preparing a standard tax return, Erin is using Figured to provide this ranch with specific, actionable insights they never had before:

- ➔ **Detailed income and expense tracking** by herd and program type
- ➔ **Gross margin per head** calculations to understand true profitability
- ➔ **Real-time financial data** for managing insurance and operational decisions
- ➔ **Forward-looking analysis** to guide breeding program investments

"This is exactly the kind of operation that needs better financial visibility," Erin says. *"They're making significant investments, and they need to understand their true returns."*

Early Results

Erin has already noted several promising indicators:

An Increase In Efficiency

The automation potential means Erin can deliver more value without expanding headcount.
"I can see how this could essentially replace a staff member in terms of manual reporting work."

Clients See Immediate Value

Early client response has been positive. When ranchers see the potential for metrics they've never had access to before, the value proposition becomes clear.

A Repeatable Approach

The standardized workflows being developed are designed to be repeatable across multiple clients, creating a pathway to scale advisory services to more small and mid-sized operations.

The Bigger Picture: Why This Really Matters

> ***"Right now, small ranchers and farmers don't have good options for comprehensive financial insights without high costs."***
>
> ***"There's a real need in the industry for accessible tools that help operations of all sizes make better decisions."***

Erin's work with Figured represents a shift in how accounting firms can serve agricultural clients—moving from reactive compliance to proactive advisory relationships that deliver year-round value.

The accounting firms that will win with agricultural clients aren't necessarily working harder or hiring more staff—they're using tools actually built for agriculture. While most firms are still wrestling with generic software and custom spreadsheets, practices like Erin's are exploring purpose-built solutions that meet ranchers where they are.

To Be Continued...

Erin is continuing to refine her workflows and onboard more clients using the processes she's developing with Figured. As she scales her implementation, she'll be able to validate her vision of making meaningful financial advisory accessible to smaller operations.

"This is about building something sustainable," *Erin explains.* ***"Not just for my practice, but for the clients who need these insights most."***

Want to learn how Figured can help your agricultural clients?

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Visit figured.com

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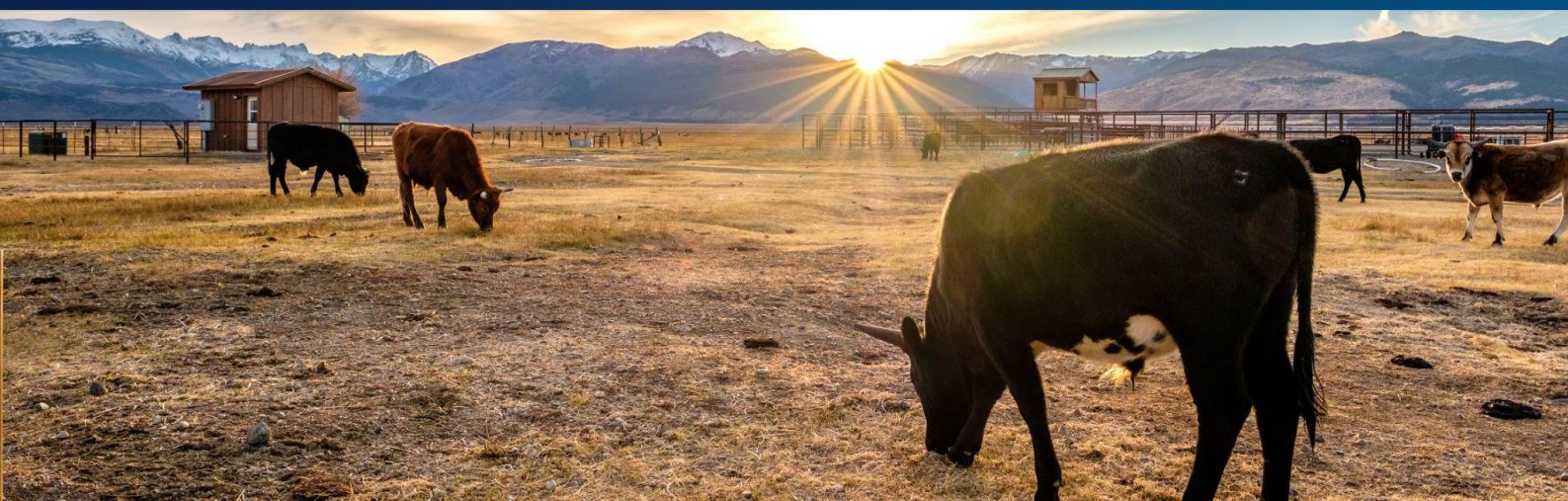
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