

Client Fact Sheet

Using Automation to Eliminate Manual Processes

Jackson County, Oregon

County Government

Jackson County was utilizing a manual-based investment accounting system, which was cumbersome and time consuming at period-end. Because of these manual processes, important tasks like mark-to-market and completing GASB disclosures were difficult. Clearwater's fully integrated investment accounting and reporting system provides Jackson County with automated and daily reconciled investment data. With Clearwater, Jackson County can mark-to-market each month for a timely distribution of investment income to county departments and complete GASB disclosures quickly and easily. Clearwater's automated reporting enables Jackson County to receive timely and accurate data, create customized reports, and share those reports with their various stakeholders.

"We have confidence that our numbers are correct with Clearwater. With the push of a button, I have all the data I need for board reporting without any manual processes. It's incredible, and I would recommend it to anyone."

Shannon Bell, Finance Director and Treasurer
Jackson County



\$350+ million
Assets Under Management

- Equities
- Corporate Bonds
- Agency Discount Bonds
- Certificates of Deposit

✓ Automated, timely data for faster month-end close

✓ Daily reconciliation for accurate and up-to-date data

✓ Timely mark-to-market for more frequent distribution of investment income

✓ Automated and efficient GASB disclosures

See how Clearwater can help your organization.

Speak to an Expert →