

# ACCOUNTING CS: "A TREMENDOUS AND ENLIGHTENING EXPERIENCE"

## Improving client service with powerful software

**Amalie Ann George, CPA, PC** is a full-service accounting firm based in Needham, Massachusetts. The firm has six employees and services small business owners and individuals, in addition to doing niche work for agricultural clients and farmers in the Boston area. The firm offers a variety of services—from tax returns and financial statements to payroll and consulting.

A 35-year veteran of the profession, Amalie Ann George founded the practice in 1995. That same year, she became a Thomson Reuters customer and has had a close relationship with the products and people ever since—she's even attended SYNERGY, the annual Thomson Reuters Users' Conference, more than 20 times.

"Thomson Reuters gives me the tools to provide clients with top-notch technology to service them—that's one of the biggest strengths that Thomson Reuters has and they're always trying to improve that process," George says. "Some of us have smaller firms and we don't have that infrastructure so we need that assistance, and Thomson Reuters provides us with that."

George and her firm were excited to transition to Accounting CS, and found the integrated nature of the software and the streamlining of the payroll process to be especially helpful.

### A WONDERFUL LEARNING CURVE

"When I changed to Accounting CS I did have some reservations, but it has been a tremendous and enlightening experience," George says. "The process is so much easier, and the developers have really thought of the bells and whistles that we need as professionals to service our clients in an efficient manner, so we can be doing other things like consulting."

The clients of Amalie Ann George, CPA, PC are happy that the firm can offer real-time communication that speeds up processes and services—and the staff appreciates the ease of collaboration while working in the same client at the same time, too. "My staff accountant can be doing journal entries and the payroll clerk can be doing payroll, so there's excitement," George says. "It was a learning curve, but it's a wonderful learning curve."

George's other favorite features of Accounting CS are viewing multiple clients at the same time (without time-consuming opening and closing actions) and the ability to customize dashboards to make the technology work for her firm—so her firm can best serve clients without being forced to adapt around the technology. "We have seen the revenue spike up because we can use Accounting CS to capture more of the expenses with the payroll part of Accounting CS, and we are more efficient in getting the product out," George says. The ease of processing client information improved, as well. She also appreciates the ability to switch between the firm and client dashboard, and how the software streamlines the work with an appealing visual design.

"I would strongly recommend that a fellow practitioner look at Accounting CS for their firm," George says. "I think it's a very good product for someone to have, especially just starting out—Accounting CS is a good baseline and it allows for a lot of integration within CS Professional Suite®."

## ACCOUNTING CS®



**AMALIE ANN GEORGE, CPA, PC**  
*Amalie Ann George,  
President and Partner*

### ABOUT

Amalie Ann George, CPA, PC is based in Needham, Massachusetts. The firm has six employees, and primary clients are comprised of individuals, professionals and the agricultural, manufacturing and retail industries. Services include tax management, accounting services, payroll, cash flow and budgeting analysis, IRS representation and assurance and advisory services.

### WEBSITE

At [aageorgecpa.com](http://aageorgecpa.com), the firm offers tax tips and tools, industry news, financial guides, detailed information about firm services and more.

### SOFTWARE

Amalie Ann George, CPA, PC uses Accounting CS, UltraTax CS®, Practice CS®, Fixed Assets CS® and more.

To learn more, visit [Tax.TR.com/ACS](http://Tax.TR.com/ACS) or contact us at 800.968.8900.

