

NETCLIENT CS®: SOFTWARE IN ACTION

How Ross & Company CPA, PLLC accelerates their business with the help of Thomson Reuters client portals

MEET THE FIRM

Ross & Company CPA, PLLC is an accounting firm based in Smithtown, New York that serves individuals and small businesses. **Glen Ross**, CPA, CVA, partner at Ross & Company CPA, PLLC, gave the practice its current name in 2005, although the firm actually began in 1930 with Glen's grandfather, Jack.

Ross & Company CPA, PLLC gains a competitive edge by using Thomson Reuters NetClient CS, private portals that give firms and their clients a convenient way to access documents and software, transfer data and convey information. When Ross first switched to using portals a decade ago, he wasn't sure if clients would take to them. "But the opposite ended up being true," he says, "and in 10 years' time, I doubled the size of the firm."

CLIENT PORTALS: SECURE WAYS TO ADD VALUE AND SAVE TIME, MONEY AND FIRM RESOURCES

As private, secure extensions of a firm's website, NetClient CS portals give clients 24/7 access to online accounting services from any internet connection. Portals are commonly used in daily life, in cases like viewing banking records, credit card statements or utility bills online. Why should tax documents be any different?

Ross has migrated almost all of his clients to portals, noting that portals create capacity for his office to pick up 75 to 80 new clients each year. "It doesn't bring the business in the door, but it allows us to handle the business that does come in the door without having to increase staff," he says. With NetClient CS, clients can be added to a firm's roster with little added work. "We can store [clients'] tax and accounting information, and they have 24/7 access to it online through our website," Ross says.

No longer does the firm do the time-consuming tasks of printing, copying, collating, stapling and mailing returns. By doing business online, Ross says using portals is not only a time saver, but a cost saver as well—especially in terms of purchasing storage furniture and office supplies. "We go through about five cases of paper a year," he says. "We used to go through five cases a month. We have to check our toner to make sure it hasn't expired. We have zero file cabinets."



FIRM

Ross & Company

Glen Ross, CPA, CVA, Partner

ABOUT

Ross & Company CPA, PLLC is based in Smithtown, New York. The firm serves individuals and small businesses in various industries, such as insurance brokers and agents, professional services and real estate entities. The firm offers a broad range of services, including tax preparation and planning, small business accounting business valuations, payroll and estate planning.

WEBSITE

You can learn more about the firm and the services they offer at RossCompanyCPA.com.

SOFTWARE

Ross & Company CPA, PLLC uses NetClient CS, NetFirm CS™, NetStaff CS® and Software as a Service (SaaS).



Another benefit of client portals is the improved ability to serve a client base that is geographically diverse. Clients can access the portal—using a computer or mobile device—from anywhere in the world, meaning firms can provide great service no matter where clients are: on vacation, on a business trip or based in a city across the world. “Being able to collaborate online with your clients makes it so easy, like they’re right next door to you,” Ross says. And due to the 24/7 online access of portals, there aren’t long delays in getting information from clients.

For corporate clients using QuickBooks® in particular, backup files can be 75 MB or more, an impossible size to email. In the past, flash drives or backup CDs were mailed, but by using a portal, transmission is faster and easier. “We can talk to a client and five minutes later we could have their tax information,” Ross says. Clients can review and respond about tax returns more quickly, as well.

Private portals are also extremely secure, a necessity for firms concerned about the security of email and paper files. “Built into the portal is a secure file exchange utility,” Ross says. If tax-related files are small enough, email is an option, but he says, “That’s not secure, and a lot of clients don’t like to do that because Social Security numbers are on it.” He finds that his clients are very comfortable uploading their documents through the portals.

NetClient CS is a powerful way to stand out from the competition. “Clients who now come to us, new clients who have never seen a system like ours, absolutely love it,” Ross says. “They recognize our technology advances and they like that. It becomes a great selling tool.”



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- **Glen Ross**
Partner, Ross & Company

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To learn more about NetClient CS, visit Tax.TR.com/NetClientCS or contact us at **800.968.8900**.

