

ACHIEVING FIRM MATURITY THROUGH CONTENT AND CONSULTING

Dale Jacobson, CPA moved his firm into this century with Practice Forward™

Dale Jacobson likes to adhere to his city's motto, "Keep Austin weird." Located in Austin, Texas where startups and young businesses are fast-growing and demanding, Dale's firm, **Kenneth Dale Jacobson, CPA, PLLC** needs to be flexible and address any client issues that arise.

"[Clients] are looking for one stop shopping. They want holistic practice management where they can come in and address generational tax strategies. We're trying to be one place for everybody."

This client demand for advisory and consulting services drove Dale to search for technology that could help his firm stay competitive and expand services, taking advantage of client questions and demand.

"The entire process of **Practice Forward** integrates you with experts who are not only experts in Thomson Reuters solutions, they're also experts in the latest technology and knowledge. "

Dale started out as a sole practitioner, mainly handling tax preparation. As his workload grew, he knew he needed a better solution.

"Practice Forward has made my work life easier because now I'm more focused on sales and marketing rather than just grinding out tax returns. Part of the Practice Forward metamorphosis for me has been that it caused me to hire the staff I need. I used it as a catalyst to go forward, and it's helped. This time last year I was buried. Early tax season this year was horrible until I got started with more Practice Forward strategies and also got some additional staff on board."

This shift in the firm has helped Dale and his staff take advantage of increased collaboration and improved results.

"I didn't expect this level of efficiency. It's taken a while to get my data organized and to speed, but that's all done now. It's really limited how much time we spend looking for information. The Practice Forward screens in Practice CS allow you to look at a customer relationship database for a single customer, rather than digging around in various places for the information."

Of course, another great benefit of Practice Forward is the impact on Dale's bottom line, even in the early stages of adoption.

"Revenues have increased," he says, "because I'm doing more value-added billing items."

PRACTICE FORWARD™



**KENNETH DALE JACOBSON,
CPA, PLLC**

Dale Jacobson, Owner

ABOUT

Located in Austin, Texas, Kenneth Dale Jacobson, CPA, PLLC provides personalized financial guidance to local individuals and business. They specialize in a number of professional services, including tax management, accounting, financial and retirement planning, international taxation and more.

WEBSITE

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

SOFTWARE

Along with Practice Forward, the firm uses NetClient CS®, Onvio™, Practice CS® and Web Builder CS®.

To learn more, visit
Tax.TR.com/Practice-Forward or
contact us at **800.968.8900**.

