

MIDWEST STATE OF MIND

Williams & Company, PC uses GoFileRoom and AdvanceFlow to work hard for their clients.

Midwesterners are often portrayed as hard-working, salt-of-the-earth people who love their families and football season (not necessarily in that order). They'll give you the shirts off their backs—not to mention any other kind of help you need.

Stereotype? Not to **David Radke**, president of **Williams & Company, PC**, who can attest that every bit of it is true.

"Pretty much everyone in our office is from the Midwest," Radke says. "We're a hard-working group that uses technology to its fullest so we can access information from our homes, at client offices or where ever we need to be."

With seven offices in Iowa and South Dakota—the heart of the Midwest—and 65 employees dedicated to audit and tax, technology is the key to effectively serving the firm's clients. Radke, who is in charge of the Onawa, Iowa office, and his eight employees there specialize in nursing home audits, while the rest of the offices handle government, small business and other industries.

Because their offices are so spread out, Radke finds that technology has been immensely helpful in meeting different client demands.

"We've been paperless on the tax side for about ten years, and on the audit side for about seven years," he says. "Our employees love to use technology, which is why we went to Virtual Office CS.

"During tax season, we're able to have someone scan in documents and prepare files from any of our offices—without having to drive to a client's office. That's especially beneficial in Iowa, with the nice cold weather," he adds with a laugh.

"We've been doing that for the last three or four years. Our staff can prepare the returns and keep our workflow moving, and we don't have to worry about them traveling in the wintertime."

Not only is the firm able to serve their clients from wherever they are, they've found that the software has been great for tracking and establishing their own workflow.

"We can see the status of any document. We can also see where tax returns stand, or where we are in the audit process. Even with tax planning, we can make use of the workflow option to stay organized."

With a smooth workflow and clear organization, the firm is able to focus more on collaborating with each other and with clients.

"[With the software], we work together more. We can use people in different offices to help balance out the workload. AdvanceFlow allows our team to finish up an audit together without having to be in the same office."

With this kind of efficiency, Williams & Company has found that they're much more profitable as well. Because they're able to scan information faster and find it more easily, they're able to better help clients and increase the value of their service.

GOFILEROOM®
& ADVANCEFLOW®



WILLIAMS & COMPANY, PC

David Radke, President

ABOUT

Based in Onawa, Iowa, Williams & Company, PC has been in business for more than 85 years. They operate with a staff of 65. The firm specializes in serving government and small business clients. Additional services include accounting, audits, estate and trust planning and wealth management.

WEBSITE

At williamscpas.com/our-firm, the firm offers a wide range of online services including financial guides, IRS forms and tax tips.

SOFTWARE

In addition to GoFileRoom, Williams & Company uses UltraTax CS®, Practice CS®, Engagement CS®, Accounting CS® and AdvanceFlow®.

To learn more about GoFileRoom or AdvanceFlow, visit Tax.TR.com/DocMgmt, or contact us at 800.968.8900.



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