MAXIMIZE YOUR FIRM'S EFFICIENCY WITH A TAX WORKFLOW ASSESSMENT
HOW EFFICIENT IS YOUR WORKFLOW?

80 percent of accounting firms waste more than 30 minutes a day searching for information, and 60% of staff are spending more than an hour a day duplicating work.¹

Is your accounting firm in step with technology? Or do you use a number of disconnected applications that you've gradually discovered can't function effectively in today's rapidly changing profession?

At its heart, technology isn't an expense; it's a strategic capital investment. But too often, firms will try to force-fit their existing technology into their processes, thinking new technologies are more of an investment than they're willing or able to make. The resulting jumble of unrelated applications makes it harder to serve clients — and limits your firm's ability to attract the new, young clients who prefer to work with their advisors via the latest technology.

In addition to technology, time is another factor that affects the success of your firm. There’s nonbillable time, like admin tasks and HR issues, and there’s the time you use to create added value for your clients — like reviewing tax returns, tax strategy and advisory services. Unfortunately, it’s these strategic services that get bypassed by the urgent matters of the day. Firms let that happen at their own peril. By quantifying your value based solely on time or billing more hours, you miss out on an opportunity to provide added value for your clients.

Whether you choose just a few applications or all of them, your products share information and automate workflow to increase your firm's efficiency and profitability — and raise the level of service for your clients.

That’s why firms like yours turn to Thomson Reuters for top-rated, integrated software and services. It’s more than just software; it’s a collaborative community where tools, resources and ideas give you a higher confidence in speed and accuracy, so you can focus on building your business and eliminate unnecessary administrative tasks.

USING AN INTEGRATED SUITE TO SAVE TIME AND SERVE CLIENTS MORE EFFECTIVELY

When you use an integrated suite of products that are built to work together, you can automate your workflow and raise the level of service you’re able to provide your clients.

Here’s an example of an integrated workflow process using Thomson Reuters software:

1. You dramatically reduce data entry because your client enters source data with your client accounting program, which lets them view financial data in real time, enter transactions and perform everyday functions like check writing, payables, receivables and payroll processing.

2. Immediately use the data across all functions in your accounting program and other applications — trial balance, payroll, financial reporting and more — because you take advantage of the web to share the same database.
   a. Manage, mark up and process your workpapers and source documents using your workpaper management software. Source document processing can automatically name and organize your documents into the folder structure you’re familiar with in your tax program, while you can use source data entry to automatically transfer data to the tax software. Should you run into any questions along the way, you can jump directly to relevant tax research.
   b. Use Microsoft® Office® integration to automate your Excel® worksheets so they’ll proforma and save you time each year. And you can make final adjustments in your trial balance program, then seamlessly export balances to your tax software in seconds.
   c. Process your clients’ payroll tax compliance, make adjustments, and create financial statements, W-2, 1099 and 1095-C forms — as well as year-end balance data — using your accounting software. And it can all be transferred directly into your tax program at tax time.

3. Post your client’s completed tax returns, reports, payroll and other deliverables to secure, private online client portals, where your client can access them anytime. On your end, all documents and data are stored securely in your document management program.

4. Manage employees and resources at every step of the process with your practice management software — and ensure your staff is always up to speed with extensive compliance and software training, all eligible for CPE credit.

5. Invoice clients and collect credit card payments directly through your clients' portal.

¹Source: Practice CS Webcast: Discover how you can better track your business and manage your clients through Practice CS, August 2016

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tax.tr/cs
THE TAX WORKFLOW PROCESS

Now that you've seen an example of how you can achieve a more automated workflow, you may want to consider evaluating your firm's operations to see how they compare.

How smooth are the operations in your firm?

Each person at the firm plays an important role, however, when the actions of multiple people affect a tax return, there is always a higher risk for errors and uncertainty. A better question to ask yourself might be: Do you really know what everyone else is doing, based on his or her role?

It's time to look at the big picture of your firm's tax workflow and the different ways you collaborate with your fellow staff members. While you do this, keep each step of the tax workflow process in mind.

One of the major challenges in figuring out the big picture involves deconstructing and evaluating your process. This white paper will serve as a guide for systematically going through and reassessing your workflow every year. We'll show you the important questions to ask, which will lead to identifying inefficiencies in your firm. Many Thomson Reuters consultants previously worked at firms and have the background and firsthand understanding to share these insights.

One common mistake is to overlook soft costs (e.g., time) and over prioritize hard costs (e.g., money spent). Let us help you avoid these kinds of pitfalls.
KEY PLAYERS IN THE FIRM

Firm sizes vary greatly, as do the roles and responsibilities of employees at the firm. For the purposes of this white paper, the following content generally describes firms with 10 to 50 employees.

• **PARTNERS** — Partners have the most power and accountability for the firm’s performance and results, often serving in an approver and/or buyer/decision maker role. They meet with clients and have return signer responsibilities — they may even still prepare a few returns themselves over the year. Some primary concerns for partners include firm growth, billable hours, adapting to changes through technology and managing tax managers and preparers. Often serving as the “face” of the firm through networking and community outreach, the ultimate goal of the partners is to provide clients with the best services and products possible, while also winning new business.

• **TAX MANAGERS** — Tax managers are influencers at the firm, and often serve as middle managers between the partner and staff accountants. As managers of accountants, they consistently monitor the status of their team’s work to ensure that collective goals are achieved and that all returns are completed accurately and on time. Tax managers make sure that they hit billable hours goals set by the partners, while also staying within total hourly budgets. In addition, tax managers may be client relationship owners and also have a deep level of insight into each step of the firm’s tax workflow.

• **STAFF ACCOUNTANTS** — Staff accountants keep the firm running. Also known as preparers, staff accountants prepare tax returns, research tax questions and issues and also advise clients. Under the supervision of the tax manager, staff accountants work toward achieving billable hours goals while staying within total hourly budgets and completing all tax returns accurately and on time. Staff accountants must use technology effectively to manage their work day and perform their daily responsibilities, reduce manual errors while working with a considerable amount of information and always provide the best possible service to clients.

• **OFFICE MANAGERS** — Office managers keep the firm running too, in different ways. Significantly influential in the daily operations of the firm, office managers focus on modernizing the office — both the physical space and in terms of providing employees with the most current technology that empowers them to do their jobs more productively. Office managers serve as executive assistants to the partners, and play a big part in maintaining office morale. Office managers may route incoming clients and information, lead some client outreach and also manage return assembly and e-filing.

• **ADMINISTRATIVE ASSISTANTS** — Administrative assistants often report to the office manager and conduct a variety of administrative tasks, which may include scheduling meetings, managing communications and doing clerical work for the office.
8 PREPARATION & PROCESSING STEPS: IDENTIFYING TAX WORKFLOW PAINS
Have you ever thought in detail about the inefficiencies that impact your daily work? There might be more inefficiencies than you realize—and regardless of your role, everyone must collaborate effectively for the firm’s overall success.

Here are some common tax workflow pains that can happen in each step of preparation and processing, along with some important questions to ask yourself and your co-workers. How well is your firm prepared to deal with these challenges?

1. **PRESEASON READINESS** — When gearing up for tax season, it’s important to walk through everything you do each fall to prepare for tax season. Make sure you know who performs each step in the workflow by clarifying the roles of each person in the firm — including daily responsibilities, how much time is invested in each responsibility and who influences which factors in three main areas: data management and clean-up, proforma and customization and, finally, assembly and delivery. Preseason readiness tasks can range from system synchronization, to proforma of client data, to collation, assembly and physical/electronic delivery.

   - **CHALLENGES FOR PARTNERS**: Determining priorities and setting the firm up for optimum growth; establishing billable hours goals; ensuring that review and sign-off responsibilities are completed quickly and accurately
   - **CHALLENGES FOR OFFICE MANAGERS**: Identifying training needs for each staff level; evaluating tax software and making any necessary changes; ensuring that program setup is consistent between multiple offices

**Top 5 Questions to Ask Yourself & Your Staff About Preseason Readiness:**

1. Walk through everything you do each fall to prepare for tax season — who performs each step and how long does it take them?
2. How long does it take your partners or client managers to review and sign-off on clients to roll forward, update addresses, etc.?
3. What kinds of reports do you like to have available to run during the season, to keep an eye on where returns are, how many are sitting at each workflow step, etc.?
4. Do you have your tax clients sign an engagement letter and, if so, how good are your clients at getting their engagement letters signed and sent back to you? How long does it take for them to do this?
5. What other actions do you or your staff take in preparation for spring (or fall) busy season?

**TOOLS TO HELP YOU STREAMLINE YOUR TAX PLANNING PROCESS**

Ready to stop reconciling your client information across multiple systems?

When preparing to send out client organizers and other communications during year end, the last thing you want is to be bogged down with manual administrative tasks. Save yourself time through automatic data sharing between UltraTax CS® and Practice CS® Client Management.
2. **TAX PLANNING** — This step involves three main areas: communication and scheduling, prior year review and current year projection and, finally, follow-up and execution. During the tax planning stage, the firm identifies clients for tax planning services and sets up tax plan projects for them. Tax planning tasks can range from preparing and sending client communication materials, to generating reports for clients, to providing additional check-in evaluations with clients.

- **CHALLENGES FOR PARTNERS:** Staying on top of clients to make sure they take any of the prescribed actions that come from tax planning; closing the loop with tax planning clients to compare projections with actual results; ensuring lower-level staff have the necessary tools to do all of their work at this stage

- **CHALLENGES FOR TAX MANAGERS:** Delivering customized tax plans to clients; determining the most effective tools, reference materials and documents to explain tax planning details to clients; ensuring their direct reports have the resources they need to provide the best, most accurate client service and achieve their goals for the firm at this stage

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**Top 5 Questions to Ask Yourself & Your Staff About Tax Planning:**

1. Whether you’re paid for actual tax planning or not, what do you do when a client comes to the office and wants to talk about next year (to project out amounts, etc.)?

2. How do you go about scheduling time with any clients who may benefit from a year-end review, and how do you make sure they know it’s valuable enough to keep their appointments?

3. What reference materials do you rely on when looking for opportunities and threats for these clients each year, and what documents or other aids do you use to help explain a client’s tax position to him or her?

4. How do you close the loop with your tax planning clients to compare your projections to what actually happened?

5. What other situations do you find yourself in where you are providing projections for clients, and what other revenue opportunities are there in this area that you might be overlooking?

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**TOOLS TO HELP YOU STREAMLINE YOUR PRESEASON PROCESS**

What if you could provide better guidance in your year-end tax planning engagements?

Now you can give your clients advice they need with confidence. With just a few clicks and keystrokes, you can export your UltraTax CS data into Planner CS®, and compare multiple scenarios.
3. CLIENT INFO COLLECTION — Collecting client information is the one step that involves every person in the firm, and is a continuous, ongoing task throughout every step of this process. Some might call it a constant battle, but one thing’s for sure — nothing can happen if you don’t have client compliance. The three main parts for this step are communication and scheduling, data collection and routing. Tasks for client info collection can range from ensuring you have a signed engagement letter from your client, to confirming payment of estimates, to routing to the Chief Risk Officer to confirm all of the information is in order. (A tip for this step: One of the most important things to consider is what your paper organizers cost — these expenses can be more significant than you think!)

- CHALLENGES FOR PARTNERS: Determining to what extent the staff or clients have to physically travel to deliver or pick up documents; figuring out printing, postage and related costs if organizers are being sent out
- CHALLENGES FOR TAX MANAGERS: Identifying opportunities for improvement in this data collecting process; evaluating the data transfer process between client return files and client organizer files (and how much additional time this may be costing the firm)
- CHALLENGES FOR STAFF ACCOUNTANTS: Collecting all of the info needed from clients to successfully prepare their returns; tracking which clients want an organizer (and what kind) from year to year
- CHALLENGES FOR OFFICE MANAGERS: Determining how much time they and their admins spend actually printing, collating and packing organizers before sending them out; figuring out how much they have to re-collate the organizers or swap in additional pages generated from outside the tax system
- CHALLENGES FOR ADMINISTRATIVE ASSISTANTS: Scheduling meetings for tax clients and making sure they show up; assisting the office manager in sending out organizers

Top 5 Questions to Ask Yourself & Your Staff About Client Info Collection:

1. How do you go about collecting what you need from your clients in order to prepare their returns, and how can this process be improved?
2. Can you identify every step of your scheduling process with your tax clients (scheduling tax appointments, etc.) and determine if there are any ways to streamline this process?
3. What does the data transfer process between your client return files and client organizer files involve, and how much additional time is this costing you?
4. Who manages the process of collecting all of this information, and who decides everything is accounted for and the return is ready to start preparation?
5. In what other situations do you find yourself needing to collect client information?

TOOLS TO HELP YOU STREAMLINE YOUR CLIENT INFO COLLECTION PROCESS

Tired of printed organizers that clients never open, let alone complete?

Instead, send your clients an easy-to-follow tax questionnaire to uncover key considerations and collect their tax documents, in the safest and most secure way possible. Clients can even send you high-quality document scans, using the simple Onvio Client Center mobile app.

What if you could get exactly what you need from you clients, when you need it?

By using document requests, you can help your clients provide documents to you in an easy, electronic and secure way — from any device, anywhere — with Onvio Documents.
4. **FRONT-END PROCESSING** — Once you collect all the client data, you enter into the front-end processing stage to assess whether the client gave you everything you need. This step primarily involves administrative tasks. Three important stages in front-end processing include organization and scanning, budgeting and scheduling staff and, finally, pre-meeting. Some common tasks are doing front-end scanning and data imports, estimating hours required for engagements and reviewing prior year returns.

- **CHALLENGES FOR PARTNERS:** Budgeting expected hours and planning out tax engagements in advance; determining whether the tax manager or staff accountant is the client relationship owner; figuring out how much direction the senior staff provides to junior staff performing basic data entry and preparation

- **CHALLENGES FOR OFFICE MANAGERS:** Determining which administrative assistant performs which front-end processing task; figuring out how staff conducting the scanning can notify the accountants that it’s ready to go; determining how much manual collation people need to do before actually scanning

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**Top 5 Questions to Ask Yourself & Your Staff About Front-End Processing:**

1. What happens to a client’s information before actual tax preparation begins (e.g., scanning, imports, budgeting/scheduling time, etc.)?
2. How much time and effort do you put into manipulating the documents after scanning (e.g., re-sorting pages, inserting bookmarks, renaming/moving the file, etc.)?
3. How much do you plan out your tax engagements beforehand (e.g., budgeting your expected hours or assigning the work to particular staff, etc.)?
4. Is the preparer also the same person managing the client relationship(s) — and if not, how do these two people collaborate prior to and during the preparation process?
5. What other actions take place in your office after receiving everything you need from your client, but before starting actual preparation?

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**TOOLS TO HELP YOU STREAMLINE YOUR FRONT END PROCESSING**

**What if you could eliminate redundancy in your work, year-over-year?**

Streamline your clean-up and import efforts with a professional trial balance and workpaper management system with Workpapers CS™. Account mappings are remembered from year-to-year, so the work you do in a client’s charts of accounts extends into future years.

**What if you could spend less time keying in source documents, and more time analyzing client returns?**

Automatically sort and bookmark an extensive array of IRS source documents and brokerage statements in addition to extracting data for client tax returns with Source Document Processing, inside Workpapers CS.

**What if you could get the relevant accounting tools and technology you need to serve and anticipate your clients’ accounting needs today and in the future?**

Eliminate client data clean up altogether by providing secure online access to a bookkeeping solution that you control. No more client interference in prior periods, deleting unnecessarily added accounts or fixing miscoded journal entries. Come tax time, returns are virtually automatic with Accounting CS® Client Access.

**What if you could manage and track assigned schedule items from one location?**

Move beyond stacks of inbound client folders as your method of assigning work to your staff. Instead, automate the process using tools such as a work queue — which staff can pull from, based on their level of expertise and the difficulty ratings assigned to the tax returns with Practice CS®
5. DATA ENTRY & PREPARATION — During the data entry & prep step, there are three stages: import and preliminary review, direct/manual data entry and, finally, preparer review and routing. Tasks for this step range from importing source document amounts, to making all necessary federal and state-level entries, to reviewing on paper or on screen with tickmarks and notes. If you discover that any information is missing, now is the time to go back to that ongoing client info collection step, and get the data you need.

- **CHALLENGES FOR PARTNERS:** Determining whether it makes sense to pool staff accountants or assign individual preparers to each client; figuring out if current tax software is serving the staff in the most effective way to do their work.
- **CHALLENGES FOR TAX MANAGERS:** Determining what role your staff accountants play in bringing information from a scan & fill solution into your tax system (and whether there is a review process of some sort); figuring out what other information your preparers consult or complete before working on the return.
- **CHALLENGES FOR STAFF ACCOUNTANTS:** Determining how much of your business return work requires you to complete or adjust a trial balance prior to working on the tax return; figuring out how many of your 1040 clients with Schedule Cs and Rentals should be integrated with a trial balance.

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**Top 5 Questions to Ask Yourself & Your Staff About Data Entry & Preparation:**

1. Can you walk through every step of your process for actually preparing a tax return and identify where time-savings opportunities may be present?
2. What forms do you complete manually today, or think are more manual than they should be?
3. As you prepare returns, what is your system in the office for keeping track of the information the client had last year and making sure that the same information gets entered?
4. If there is more than one partner, what are the different rules or expectations that the staff has to keep in mind when dealing with one partner vs. another? (Do the returns have to look different, with different pages, do preparer notes need to be entered one way vs. another, etc.)
5. What other aspects of data entry and preparation do you feel are too manual, take too many clicks or are too confusing for your staff?

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**TOOLS TO HELP YOU STREAMLINE YOUR DATA ENTRY PROCESS**

What if you could provide your staff with relevant guidance materials while they are preparing returns?

Provide your staff with a lifeline that they could use in the event of an unfamiliar tax scenario while preparing returns. With content-specific research tools in Checkpoint®, they can jump from specific lines on IRS tax forms to the relevant guidance materials — which links to other related research content. Your staff will also benefit from direct links in UltraTax CS, that relate key issues in PPC Deskbooks on Checkpoint.
6. **REVIEW & SIGN-OFF** — The three stages for review and sign-off are review and preparer follow-up, preparer revamp and routing and, finally, partner signature and routing. Tasks here can range from entering review notes and conducting a review meeting with staff accountants, to staff accountants implementing recommended changes, to obtaining a partner signature (which may involve routing back to the reviewer once or twice).

- **CHALLENGES FOR PARTNERS:** Figuring how many rounds of review are performed and who performs them; determining whether review takes place online or on paper (and if it’s on paper, what that is costing the firm in lost efficiency and paper)

- **CHALLENGES FOR TAX MANAGERS:** Figuring out whether multiple staff accountants are using tickmarks on the same returns (and if so, how to know who left which tickmark); determining if reviewers (partners) pass review notes back to your staff accountants and if they should conduct any sort of follow-up meeting together

- **CHALLENGES FOR STAFF ACCOUNTANTS:** Tracking the average number of times a return bounces between preparer and reviewer for most of the returns and thinking about whether any efficiency is being lost; making any necessary quality checks before the return is considered officially done

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**Top 5 Questions to Ask Yourself & Your Staff About Review & Sign-off:**

1. How does your office handle reviews of tax returns, and do all returns get a review?
2. How standardized are your reviewer expectations in the office (e.g., do all your partners expect staff to provide the same supporting material sorted the same way, or are there big differences between what one partner expects of the staff vs. another, etc.)?
3. What is the average number of times a return bounces between the preparer and reviewer (for most of your returns)?
4. Who decides when a return is fully complete, and who does the preparer or reviewer route the return to for processing once it’s complete?
5. What other actions take place among you and your staff during the review process, which might leave room for improvement?

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**TOOLS TO HELP YOU STREAMLINE YOUR REVIEW PROCESS**

**Looking for an alternative to stacks of folders with routing sheets?**

When it comes to managing your incoming returns, you can maximize your workflow efficiency using Practice CS project management. Receive pop-up and/or email notifications for returns that are ready for review, and then route them to assembly or back to your preparers for revision without having to walk across the office.
7. **ASSEMBLY & DELIVERY** — This step primarily involves the admin team or office manager. Generating a PDF and printing and manipulating returns is the first stage of assembly and delivery. Oftentimes, excessive manual manipulation of documents occurs, which can result in a lot of wasted time. The returns must then be delivered to clients for review and signature, and then the firm must ensure a returned and completed 8879 from the client.

- **CHALLENGES FOR TAX MANAGERS**: Determining what other steps/challenges aren’t being accounted for in the overall process of putting the return together and getting it to the client; figuring out how to avoid time-wasting manual manipulation of documents
- **CHALLENGES FOR STAFF ACCOUNTANTS**: Soliciting feedback from clients about how easy or difficult they find the firm’s portal to be; determining what changes you make to the copy of the return that comes out of your tax system before you provide it to the client
- **CHALLENGES FOR OFFICE MANAGERS**: Following up with clients until they get completed 8879s back; determining how to avoid manual hassles and any other time-wasters in the assembly and delivery process

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**Top 5 Questions to Ask Yourself & Your Staff About Assembly & Delivery:**

1. Once the return is completely done, what does the process of assembling the return and delivering it to the client look like, and who performs each of the steps?
2. What changes do you make to the copy of the return that comes out of your tax system before you provide it to the client (e.g., new letters swapped into the PDF, changing pages around, etc.)?
3. What options do you provide for delivery of a client tax return, and how many clients choose each method (portal, in-office client pick-up, mail to client, drop-off to client, etc.)? Is there a method that seems to facilitate completed returns from the client better than others?
4. How do you maintain your records of signed 8879s, and how prepared would you feel if the IRS were to come in and audit them?
5. What other steps haven’t been discussed in the overall process of putting the return together and getting it to the client?

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**TOOLS TO HELP YOU STREAMLINE YOUR CLIENT DELIVERY PROCESS**

*What if you could eliminate the expense of printed tax returns, payment vouchers and other client documents?*

Now you can, by providing them to your clients online — using the same security protocols as leading banks. The next time they need a copy of a return or an estimate voucher, they can easily access it through any computer browser or the mobile app with Onvio Client Center.
8. **MEETING & E-FILE** — The final step in this process. Like the previous steps, there are three stages: communication and scheduling, e-file transmission and tracking and finally, meeting and/or notifying the client of acceptance. Tasks range from ensuring clients schedule appointments, to monitoring e-file acknowledgments daily, to providing easy-to-understand explanations for clients about their tax returns and setting the groundwork for planning, estimates and additional work.

- **CHALLENGES FOR PARTNERS:** Determining what to do when a tax return is ready for e-file (for instance, do you conduct a review meeting with the client and is it before or after e-filing the return?); figuring out who manages the e-file process at the firm; maximizing the opportunity to showcase the value your firm provides to your clients and possibly sell additional services

- **CHALLENGES FOR TAX MANAGERS:** Figuring out how to make the e-filing process more efficient for the firm and clients; staying aware of who controls the transmission of e-files in the office, if it’s restricted to only certain people and—if not—how frequently e-files get sent that shouldn’t have been

- **CHALLENGES FOR OFFICE MANAGERS:** Making sure clients come in and schedule an appointment; assisting partners with scheduling time with clients after their returns are finalized

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**Top 5 Questions to Ask Yourself & Your Staff About Meeting & E-Filing:**

1. Who manages the e-file process in your office, and what does the overall process look like?
2. How do you identify which client returns are done and ready for appointment scheduling, and who schedules them?
3. Who controls the transmission of e-files in your office, and how frequently do e-files get sent that shouldn’t have been?
4. How do you notify your clients that their e-files have been accepted (Form 9325) and is it automatic or manual, via email or by paper/mail, etc.?
5. To what extent would you say you’re maximizing on the opportunity to showcase the value you provide to your client, and possibly sell additional services?

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**TOOLS TO HELP YOU STREAMLINE YOUR E-FILE PROCESS**

Would you like to eliminate the stress of keeping your Form 8879 electronic filing authorizations compliant, and avoid the long delays waiting for signed forms?

Give your clients a way to return their e-file authorization quickly, securely and on any device — while making your firm bulletproof to any e-file authorization documentation requests from the IRS with UltraTax CS eSignature.
CONTACT US...

Ready to revolutionize your tax workflow?

Whether you are looking to assess your current workflow for improvement opportunities, or truly revolutionize it, Thomson Reuters has the solution. Between the fully integrated CS Professional Suite— with the powerful UltraTax CS at its heart — and workflow consulting (available whether you use our software products or not), Thomson Reuters can help you realize a more profitable tax business.

Contact your account representative today at 800.968.8900 or cs.sales@tr.com to learn more about how you can streamline your tax workflow.

“[The Thomson Reuters Consultant] information which was provided to us was invaluable. We were able to reduce our average tax return turnaround time by nearly 3 days with enhanced functionality of the application, as well as having my team more comfortable with the software. I would strongly recommend the personalized consulting to everyone who uses the product.”

—Jon Godwin • Godwin & Associates, CPA • Greenville, SC

“I didn’t quite know what to expect from the onsite visit with the Thomson Reuters consultant. When he showed up at our office, before we even dug into any software programs whatsoever, we took a significant amount of time to strategize, plan and create a vision for success. We found our time with the consultant to be extremely valuable. Understanding the vision helps us more efficiently create the steps to reach our goals.”

—Robert East • East Folsom LLC • Ogden, UT

“Tax is the lifeblood of many of the firms we work with. Taking a step back to evaluate and improve tax workflow is absolutely critical to ensure a healthy firm of the future.”

—Justin Matthews • UltraTax CS Technical Consultant • Thomson Reuters

ABOUT THOMSON REUTERS®

Thomson Reuters is the world’s leading source of news and information for professional markets. Our customers rely on us to deliver the intelligence, technology and expertise they need to find trusted answers. The business has operated in more than 100 countries for more than 100 years. Thomson Reuters shares are listed on the Toronto and New York Stock Exchanges. For more information, visit tax.tr.com/cs.