

ProSeries

Tennessee Tax Preparer Relies on ProSeries® Express to Keep Clients Coming Back Year After Year

BUSINESS CHALLENGE

When Miriam Crawford was ready to move her sole practitioner tax practice to computer in the early 1990s, she wanted a software product she could rely on to maintain the long-time trust of her large client base. So, she asked some of her colleagues what they were using.

SOLUTION

- ProSeries Tax Software

BENEFITS

- Able to work with all her clients quickly, with many built-in features that reduce the number of steps required to prepare a return.
- Produces a large volume of individual tax returns effortlessly.
- Creates powerful, detailed tax plans for clients in seconds using the built-in tax planner function, and can offer multiple “what-if” scenarios for smarter business and individual decisions.

CUSTOMER PROFILE

- Sole Practitioner
- In practice since 1979.
- Serves over 1,700 individual clients.
- Uses ProSeries Express professional tax software.

“The main reason I trust ProSeries Express is its accuracy. Anytime I’ve had a client receive a letter from the IRS, the mistake has ALWAYS been on the IRS side, never on ProSeries. That’s a lot of confidence that I can have with my clients, and my clients trust me. ProSeries makes me feel worthy of the trust they have in me because I know it’s right—every time.”

—Miriam Crawford
Tax Practitioner
Rock Island, Tennessee

Professional tax preparation has been a long-time way of life for Miriam Crawford’s family. Her mother started her tax practice back in 1961, and when she was ready to retire after seventeen years she turned over the reigns to her daughter, Miriam, who was interested in a good-paying career that would enable her to stay at home with her young family. Twenty-eight tax seasons later Miriam is still going strong, and now she’s grooming her daughter to take over the practice when Miriam is ready to retire.

Longevity and trust are two important attributes highly regarded by the citizens in rural Rock Island, Tennessee. They trust Miriam to prepare their tax returns, and she trusts ProSeries Express to get the job done right.

“We have clients that I inherited from my mother who still come to get their taxes done,” Miriam says proudly. “We take care of them, their children, even some grandchildren. They keep telling me that I can’t ever quit; I think it’s the high level of personalized service that we provide our clients that keeps them coming back. ProSeries Express helps my daughter and me tremendously in delivering that service quickly and accurately. We have total confidence in ProSeries Express.”

Impressive Growth With Help From ProSeries

When she took over the business in 1979, back when everything was still done manually, Miriam says she prepared just over 200 individual returns by herself. Over the course of the next several years she grew the business carefully, taking on only what she could handle. In getting ready to move her practice to computer in the early 1990s, Miriam started making inquiries among her peers as to what software they were using. It was while attending an annual tax school for preparers that she learned about ProSeries from a fellow practitioner.

“It wasn’t even called ProSeries back then,” she says. “It was still going by the name TurboTax®, although it was a special version made for tax preparers. I went on my friend’s recommendation

and have never regretted it. I’ve never even looked at another tax product, I’m too happy with what I have.”

Today, with help from her daughter during “crunch time,” Miriam uses ProSeries Express to prepare nearly 1,800 returns each year—an impressive increase over the 200 or so she was able to do each tax season during the early days of her career. “I still get calls from other companies wanting me to switch,” she says. “I just tell them sorry, I’ve already bought for the year. I’m sticking with what I’ve got.”

ProSeries Express Simplifies Things—Without Compromising Quality

Like any successful business owner, Miriam is always watching her operating costs and productivity in order to remain profitable while still providing the high level of fast, accurate service her clients trust her to deliver. So when ProSeries Express was released a few years back, she was pleased to find that it offered everything she needed and nothing she didn’t.

“I really liked the regular ProSeries product,” Miriam says, “don’t get me wrong. It could do everything I needed for my clients. The one downside, if you could call it that, was that it could also do a lot of things that I didn’t need, like preparing corporate and partnership returns. It had more horsepower than was necessary is what I guess I’m trying to say. I would have stayed with it because I trusted it so much, but when I saw what came with [ProSeries] Express, it was the perfect match for my business. I’ve been using it since it first came out and haven’t missed a feature or function from the original program, and that’s a good thing—because I didn’t want to change anything about the way I worked or what the end product looked like. That’s what people come to me for.”

Saving Time by Boosting Efficiency

With tax laws seeming to get more complex every year, a big part of Miriam’s job entails just keeping up with the changes and understanding how they

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work. According to her, there is so much interaction between the complexity of tax laws and the exact hierarchy in which those laws are applied on a return, that to try and figure it out manually would create a monumental, time-consuming challenge. That's why she leaves the job to ProSeries Express, knowing she can trust the program to go through the steps of applying credits and deductions in the proper order, so she doesn't have to worry about it.

Miriam also likes the way that ProSeries Express is enhanced each year to make it more efficient, so she can prepare returns faster. "I'm always a bit reluctant for Intuit to change things," she admits, "because I'm so familiar with how it works. But when something is changed, you see immediately how it's better and so you're glad they put so much work into it."

One recent improvement she really appreciates is the way she can jump back and forth between multiple asset worksheets when determining depreciation for her farming clients just by clicking on tabs across the top of her screen. Miriam says that it really helps not having to go back several steps like before. The fewer steps, the faster she can move through the program and the quicker she can send her happy clients on their way.

Accuracy She Trusts

Perhaps the thing that people like most about the way Miriam helps them with their taxes—in addition to being available to answer tax questions during the off-season, file on

extensions, and offer bank products—is that they trust her work to be correct.

"My clients trust me to do my job right," she says, "and with ProSeries Express I feel worthy of that trust. I have no doubts. That's one of the things I love about the program. Any time I've had a client receive an IRS letter stating that there was an error on the return, the mistake has ALWAYS been on the part of the IRS, never because of ProSeries."

Miriam cites an example where she had used an alternative method of figuring Social Security for a farmer.

"The farmer had an overall loss for the year, so ordinarily he would not get any earned income credit on that," she says, "however, farmers are allowed to pay in under the farm optional method just so they can get some Social Security credit. That action triggered some earned income credit, but the IRS disallowed it. I went back and printed out the worksheet that ProSeries Express used to figure it out and then I called the IRS. Now, I had to go through three different agents, but when I finally reached the one who says "yea" or "nay" and I go over the numbers, he agreed and issued a refund. So I'm totally confident that ProSeries does it right."

Building Client Confidence

The easy-to-use interface in ProSeries Express enables Miriam to prepare a return while her client is sitting across her desk, which is how

she prefers it. She angles her monitor so that both she and her client can see it, and she points out things as they go along. When she gets to the end, she reviews everything with them to make sure nothing was missed. The error check feature in ProSeries Express also helps make sure everything is correct—especially when credits or deductions are new for the year. The error check function immediately flags any oversights and takes her right to the problem area so she can correct it on the spot.

Miriam also makes extensive use of the tax planner function built into ProSeries Express to help her clients make smart decisions that could affect their future tax liability and explore options.

"My clients like the fact that they can see what I do and how I'm doing it," she says. "With ProSeries Express, they understand what their tax is, what credits they're getting, how much they've paid in... Most of their questions get resolved while they're sitting right there in the chair. After all, it's their life, their responsibility. The more they understand about their tax situation, the smarter choices they're going to make. My job is to help them so they're not worried about their status with the IRS. As I tell my daughter often, you take care of the client and the business will take care of itself. ProSeries Express helps us to do that. I wouldn't be without it."

ProSeries Express software enables Miriam Crawford to:

- Prepare individual 1040 tax returns quickly and precisely.
- Pull client data from their current ProSeries tax returns and easily create detailed scenarios to help clients see side-by-side comparisons, make better-informed decisions, and project future tax bills.
- Show clients what she's doing on-screen, so they understand how their tax liability is established and answer all their questions on the spot.
- Have confidence in her tax work when dealing with the IRS.
- Continue building client trust in her abilities and her work.

FOR MORE INFORMATION

For more information about ProSeries software products, visit www.proseries.com or call **(800) 800-945-2820**.

Free Evaluation Kit

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