

ProSeries

ProSeries® Express Helps Family-Owned Tax Practice Compete Successfully with Big Name Rivals, Offer Faster Service

BUSINESS CHALLENGE

Providing fast, accurate service to his clients has long been a hallmark of Clarence Coursey of C&S Accounting and Tax Service. With the population growing around his Morrow, Georgia practice, he started looking for a tax software solution that would both help him work quickly so as to keep up with the demands of impatient customers and enable him to offer the bank product options important to some of his clientele.

SOLUTION

- ProSeries Express Tax Software

BENEFITS

- Easy to install and learn, so his staff could start being productive immediately.
- Produces a large volume of individual and business tax returns effortlessly.
- Designed to facilitate the transmission of bank product refund loans quickly and efficiently.
- Tax Summary shows effect on tax return total as client data is entered.

CUSTOMER PROFILE

- Staff of six.
- In practice since 1975.
- Prepares over 900 individual and 100 business returns annually.
- Processed 177 bank product returns in tax year 2005.
- Uses ProSeries Express professional tax software.

Atlanta, Georgia has become economic powerhouse in the Southern United States, attracting a huge influx of new businesses, investment capital and people. And as the city proper has expanded, its population has spread into the surrounding areas bringing with it new business potential and new competition. Clarence Coursey is the owner of C&S Accounting and Tax Service in nearby Morrow, Georgia, and he relies on ProSeries Express tax software to help him and his staff of six work more efficiently in order to provide faster service than the big name competitors that have come to the region recently.

“We concentrate on service and speed,” says Clarence, who has been providing bookkeeping and tax services since 1975. “When clients bring their work in here, I don’t let it sit around a week to 10 days just to justify my fees. My philosophy has always been: get it in, get it done and get out it the door, because you can’t charge the client until the work is complete. ProSeries Express is the best solution I’ve found to help us get the job done fast and I think that’s what sets us apart from our competition.”

Meeting the Tax Prep Needs of Multi-Generation Families and Newcomers Alike

About 900 individuals and one hundred businesses rely on Clarence each year to get their taxes done right. He takes pride in having served entire families, some covering three generations. He cites as an example a woman who started out as one of his very first clients 31 years ago. Today, he prepares taxes for her, her children and her grandchildren. And when the matriarch sold her business recently, Clarence retained the new owners as clients also.

In long-time relationships such as these, it’s plain to see that trust is a major factor—and why it’s not unusual for clients to travel fifty or sixty miles to make use of Clarence’s services. With its ease-of-use, streamlined interface and powerful error-checking, Clarence knows he can rely on ProSeries Express to help keep that trust going, and to get the work done quickly and accurately.

In addition to his regular clientele, Clarence and his staff also serve the tax preparation needs of a transitional population in five large apartment complexes just down the road. Among them are many individuals who are moving through this dynamic region to new jobs or into one of the 12 burgeoning subdivisions that have sprouted up nearby over the past five years.

Clarence says that walk-in clients from the immediate area bring him a fair amount of business if only on a one-time basis. For this group, which consists mostly of simpler returns, speed seems to be particularly important, and for Clarence, ProSeries Express helps meet the demand for fast turnaround. “We have people come by here that went to one of those major tax preparation firms down the street where there was a two-hour wait just to sit down with someone. These folks, they don’t want to wait so they come see us, and even though they may say those bigger firms might be a little bit cheaper on this or that service, they’ll come to us because we can get them taken care of quicker. The efficiency with which ProSeries Express operates and the ease with which we can enter customer data makes a world of difference in helping keep our clients happy. I have confidence that the calculations are accurate, and the e-filing is impressively reliable.”

ProSeries

A Faster, Dependable Way to Offer Bank Products

In taking care of his transient clientele, Clarence finds ProSeries Express to be especially useful, as many of them are strong users of bank product refund loans and their business helps add to his revenue stream.

When bank products appeared several years ago, Clarence admits that he wasn't eager to jump on the bandwagon at first. The technology was too new and he didn't feel he knew enough about bank products to feel comfortable offering them. As the kinks got ironed out, however, he soon saw the potential and that he could miss an opportunity if he didn't get onboard. That's why he was especially interested in ProSeries Express when it came out, as it is geared towards processing bank product returns quickly and helps Clarence get his clients their refund loans with minimal delay.

"With some of my low-income clients, they might come in for a refund loan because they're getting Earned Income Credit and that could be \$3,000 or \$4,000," Clarence explains. "For many people around here that's a lot of money and it can make a huge difference in their lives. We've had a few folks over the years about to be put out of their apartment because they couldn't pay their rent. Getting that refund loan quickly has saved the day for some of them. It makes me feel good to provide these customers with a much-needed service."

Clarence also notes that Intuit's integrated e-filing system has also been a real boon to his bank product business, and his practice in general. Before he switched from TAASC Force software to ProSeries, he says e-filing was plagued with problems and that he spent a lot of valuable time on the phone with TAASC technical support. Since he moved to ProSeries Express, Clarence says, things run a whole lot smoother.

Accommodating Last-Minute Requests With Ease

Like most tax preparation professionals, Clarence encourages his clients to avoid the last-minute rush by filing early in the season. And like many tax pros, he always has those individuals who just can't seem to get organized in a timely manner, or put off getting their taxes done until the last possible moment.

"During the final week of tax season we'll have customers come in here at the last minute with complicated tax returns," he says, "and they do that, I'm sure, because I always accommodate them. I always get it back to them on time." For situations like these, Clarence says he's glad he's got ProSeries Express to help him and his staff get through the crunch.

ProSeries Express software helps enable Clarence Coursey to:

- Prepare a high volume of individual and corporate tax returns quickly and accurately.
- Serve a large number of clients, both long-time regulars and walk-ins.
- Have confidence that calculations are accurate.
- Continue long tradition of client trust in his work.
- Ability to serve last-minute clients and deliver on time.

FOR MORE INFORMATION

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

Free Evaluation Kit

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