

“With Trial Balance, we save everything in one place. It saves so much more time.”

Laureen Falco
CPA, LLC
Houston, Texas



A major time-saver

All of Trial Balance’s many features add up to one single, powerful benefit: saving time. Laureen Falco explains: *“The QuickBooks Online Trial Balance feature gives us much more time to provide quality service to our clients, it streamlines the process, and we’re actually able to give the client much more value and much more attention. Because it’s cut down our work time so much. And it’s so much more efficient.”*

Rewarding for clients and accountants

“The thing I find the most rewarding about the work I do is being an advocate for the client.”
Laureen appreciates how the time-saving features of Trial Balance allow her to do so much more for her clients. As a trusted advisor, she’s spending less time crunching numbers and more time sharing her business expertise.



“The time that I save in using the QuickBooks Trial Balance feature, I can dedicate to other clients, picking up more business, streamlining other processes, and making my business more efficient.”

Loaded with valuable features

Laureen points to key features of Trial Balance that she loves.

Through *Adjusting Entries*, she can capture changes while preserving Trial Balance data. *Attaching Notes and Workpapers* allows her to keep documents in one easy-to-access location. *Data Preservation* means her work is updated automatically.

Laureen talks about *Adjusting Entries* as “incredible.” With her favorite feature—*Attaching Notes and Workpapers*—“it’s wonderful to be able to save everything in one place.” For Laureen, being able to preserve data “gives you a lot of peace-of-mind and security.”

Built with real insights

Part of the reason Trial Balance meets so many needs of accountants is that it was created with direct input from accountants like you—including Laureen. She says, *“It means a lot to me that Inuit really listened to practitioners who are out there in the field, working with clients on a daily basis, on what’s going to make it more efficient for us to work.”*

The result is an unprecedented level of time-saving utility, from eliminating manual data entry to exporting directly into Intuit Tax Online.



Trial Balance “is not just for year end. It’s for month end, it’s for quarter end, it’s for tax preparation prior to even doing a return. It’s a good analysis tool. It has a lot of benefits.”