

ALFERMANN, GRAY & COMPANY, LLC

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"As our firm grew, we had a period of time where one partner retired and we needed to replace him. Instead of going out and looking for someone new immediately, we decided to explore the idea of partnering with advanced technology—that's why we chose UltraTax CS. With UltraTax CS and the CS Professional Suite, technology became our partner."

"We're a small firm in the Ozarks, and we've had to change our processes in creative ways to continue to be profitable. For example, we've had to address the difficulties of hiring and retaining qualified staff by adding retirement plans, health insurance, flexible time, and monthly bonuses."

"While finding ways to make our firm more profitable, we evaluated our processes and realized that by integrating our programs instead of choosing a program for each task, we could look at our practice as a whole and quickly identify areas that could be streamlined effectively. In this business, efficiency equals profitability. Utilizing technology and a total system approach is necessary for firms moving into the future. There are also compliance concerns today that were not present 10 years ago. Compliance is key and the best defense is to have a system in place."

"We deliver a full service and the tax return now is a by-product. UltraTax CS takes advantage of the latest technology and adds value to customer service. The integration and its ability, along with the CS Professional Suite, to standardize practices, gives our staff the ability to address a client's questions or concerns—even if they didn't prepare the return—because they are confident of the quality of work leaving the system."

"UltraTax CS doesn't replace the knowledge of our staff; however, it allows our staff to utilize the knowledge they have by automating the mundane tasks and giving them more time to focus on profit-generating activities."

Felicia Dixon, EA, a Certified QuickBooks® Advisor, Certified BillQuick National Trainer & Advisor, and member of the Microsoft® Professional Accountants Network, is also a part of the team at Alfermann, Gray & Company. She had this to add:

"Using an integrated system of products shortens the learning curve for our staff as well. The interface of each program is similar and the software is automated, reducing our time keying in data. We can do a corporate return from start to finish, including a bill, in 45 minutes."

"We also mandate use of the web-based Client Organizer. Our clients love it because they can complete it from start to finish online. And we love it because their data flows directly into UltraTax CS, so there's no data entry. We use the Preparer Review Report in the Client Organizer to review the return and see the knowledge of our staff. This allows us to place new people, determine where further training is needed, and shift work loads—even during busy season."

"In our office we not only integrate our software, but our people and processes as well. By setting standards and using tools such as the Preparer Review Report in UltraTax CS, we are able to empower employees while retaining control. UltraTax CS provides the tools necessary to set these standards, train our staff, and streamline our workflow. Our productivity has increased and we have reduced time spent by 75% on each business return, which is our main source of revenue."

ULTRATAX CS



**ALFERMANN,
GRAY & COMPANY, LLC**

Larry Gray, CPA
Owner & Partner

ABOUT ALFERMANN, GRAY & COMPANY, LLC

Alfermann, Gray & Company, LLC is located in Rolla, MO and specializes in financial planning, tax planning and return preparation, auditing, payroll and business valuation services.

