

THE MAGIC OF INTEGRATION: RELIABLE SOLUTIONS, MEASURABLE RESULTS

INTEGRATION

Firm makes the most of integrated, go-anywhere software solutions.

In 2010, when Scott Geans, CPA, acquired the firm he's a managing member of—**NGS in Plainfield, Ind.**—he also acquired their Thomson Reuters software.

Although the firm was using a number of Thomson Reuters products, Geans quickly recognized an opportunity to make them even better: Software as a Service (SaaS) and Virtual Office CS.

"The number-one thing that attracted me to SaaS was the reliability and the confidence in knowing I had an off-site IT team, that if I had questions about any software I could pick up the phone, get an expert, and talk through it to achieve a resolution," he explains.

Another benefit? Knowing that all of the firm's data is backed up in the cloud. *"It's safe and secure,"* Geans says. *"I don't have to worry about coming in and making backups. All the updates are automatic. It takes stress off my plate that allows me to spend more time generating revenue and value for the firm."*

Plus, the firm's employees love the fact that Virtual Office CS lets them access their email from anywhere. In fact, they can access everything they need to take care of clients from home or wherever they are.

PLAYING FAVORITES

When asked what his favorite Thomson Reuters software is, Geans says it's tough to single out just one.

"They're all powerful," he explains. *"I think it's the magic of them integrating and working together that really creates the value for me. That's my favorite thing about Thomson Reuters products."*

UltraTax CS is a prime example. The firm can use it to print right to FileCabinet CS, print and email the client their tax return right from UltraTax CS, and set up rules to automatically bill through Practice CS.

Plus, when Geans is reviewing a return in UltraTax CS, he can see the time spent on the return compared to the previous year, so he knows what to bill.

"With Practice CS, I have confidence in the data to provide me the knowledge to know where I'm making money and where I'm losing it—by client, by project type, or by work code," Geans explains. *"I can make much more informed pricing decisions."*

MAKING A GREAT IMPRESSION

The insights provided by Thomson Reuters software also help NGS deliver better information to its clients.

For example, the firm uses UltraTax CS to provide projections to clients by plugging in data such as investment losses or dividends. The software automatically takes current legislation and guidelines into account so the information is always up to date.



NGS IN PLAINFIELD, IND.

Scott Geans, CPA

FIRM FACTS

BASICS—

Based in Plainfield, Ind., NGS has a staff of six, including three tax and accounting professionals. With a roster of between 600 and 700 clients, the firm provides services to individuals and businesses including tax preparation and compliance, planning and consulting, payroll preparation and compliance, and general business consulting.

WEBSITE—

At ngsadvisors.com, the firm offers resources including tax preparation tools, educational materials, and links to tax-related information.

SOFTWARE—

In addition to Software as a Service and Virtual Office CS®, NGS uses an array of tools including Practice CS®, UltraTax CS®, Accounting CS™, FileCabinet CS®, and NetClient CS®.



THOMSON REUTERS™

INTEGRATION

REAL RESULTS:

PRACTICE CS BOOSTS FIRM REVENUE

NGS, a tax and accounting firm in Plainfield, Ind., is dedicated to delivering a complete array of services to its clients. But there's even more to it than that, says Scott Geans, CPA, a managing member.

"We want to be a one-stop shop for the small business owner," he explains, "with the goal of helping them sleep better at night."

It must be working, because the firm has seen a measurable boost in business. According to Geans, revenues have nearly doubled in three years—including a \$50,000 increase in revenue generated by making changes based on data pulled from Thomson Reuters software.

"I attribute a lot of our growth to using Practice CS to identify where we're making money and where we're not, so we could adjust our rates accordingly," he explains.

"Thomson Reuters has made a significant difference in the way our firm is operated."

"When I can show them the projections for this year compared to last year, you can see the amazement in their eyes," Geans says. "UltraTax CS is comprehensive tax preparation and planning software. To simply call it tax preparation software is not doing it justice."

What's more, Thomson Reuters helps NGS make a great impression with secure web portals created with NetClient CS. That's one reason the firm signed up to have its website redesigned by Thomson Reuters.

"We've been so happy with the functionality of all our software programs and the Thomson Reuters user experience," Geans says. "That's a big deal, because you can have all the correct data but if the user experience isn't good, that's what the client is going to remember."

He adds that one of the firm's clients is a \$20-million company that uses NGS for its payroll. According to Geans, the chief financial officer loves that NGS is able to push all the reports the company needs out to their portal.

"When we can win the blessing of the CFO of a \$20-million company, we must be doing something right," he says. "What we're doing right is partnering with Thomson Reuters."

