

TOROSIAN & WALTER, LLP

"For someone who's thinking of switching... one of the best aspects of UltraTax CS is the support."

Torosian & Walter LLP is a full-service accounting firm with 30 full-time staff members. For years, the firm used Intuit Lacerte® as their tax software, with Practice CS, NetClient CS, and FileCabinet CS rounding out their workflow tools. However, as their processes became more technology-driven, Torosian & Walter realized they needed to take a step back and find a tax program that integrated with their Thomson Reuters products.

"We used Lacerte for many years, and it worked well for us," said Gary Wolfe, CPA and project manager, who oversees Torosian & Walter's tax season processes and workflow. *"But by not using an integrated tax program, we had to enter information in several different places. While we made Lacerte work with FileCabinet CS and NetClient CS, we knew UltraTax CS could make the process even better by having the information flow right into the other programs."*

"As we evaluated UltraTax CS, the first thing we noticed was how user friendly it was," Wolfe recalled. *"We brought a couple of our less experienced staff, who had never really worked through a tax season before, into the evaluation process and asked them what they thought of the program. They said UltraTax CS made more sense to them. With Lacerte they had to know where in the program to go to input something. With UltraTax CS, being able to see the forms view and the input view made it much easier to understand, and they felt it was easier to learn."*

In addition to being user-friendly, the biggest selling point of UltraTax CS for Torosian & Walter was the amount of time it promised to save—especially during tax season. Wolfe quickly noticed a difference.

"Because I'm in charge of tax season processes and workflow, it's up to me to make sure everything is working smoothly. As we put together our process this year, we noticed the amount of time we were saving with the integration between UltraTax CS and Practice CS, and between UltraTax CS and NetClient CS. I'd say UltraTax CS personally saved me at least two hours a week during tax season on the time I'd normally spend checking to be sure statuses were correct, returns were out the door, etc. Now I only have to check in one place—our CS Professional Suite products—instead of checking through two programs."

What else does Wolfe find valuable about UltraTax CS? *"Definitely the integrated California property tax program. With Lacerte we had to buy a separate program to prepare the property tax returns, which meant a lot of reconciliation work to take the information between the other program and Lacerte. The property tax program in UltraTax CS streamlined this process for us—an unexpected and very welcome little bonus."*

"Another great benefit of using UltraTax CS is that it's easy to comply with mandated e-file processes. And because we're using integrated products, we've been able to move completely away from CD returns and go to client portals only. We've saved an astronomical amount of time by pushing returns from UltraTax CS directly into the NetClient CS portals, instead of having to load them first into FileCabinet CS and then into the portals as we had to do with Lacerte."

ULTRATAX CS



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Gary Wolfe, CPA

ABOUT TOROSIAN & WALTER LLP

Torosian & Walter LLP is located in Fresno, CA and offers tax services for individuals and all types of corporate and non-profit organizations, as well as accounting services for small business and personal financial and estate planning for individuals. Their TWist Technology Solutions takes advantage of the firm's technology expertise to help accounting firms use technology to move their practices forward. You can learn more at www.twcpa.com.



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ULTRATAX CS

When asked what the rest of the Torosian & Wolfe staff appreciates most about UltraTax CS, Wolfe doesn't hesitate. *"The simpler learning curve. They can see exactly how their input affects the return thanks to the forms view, and they can also more easily access RIA and PPC research and guidance from Thomson Reuters, which has cut down on the number of questions they need to ask the managers. We require them to look at the form and explain how their input affects it, and I honestly feel the staff has learned much more this year than they ever have before."*

Wolfe also cites the built-in four-monitor setup feature as a big advantage of UltraTax CS. *"We made sure all our managers had the UltraTax CS quad-monitor configuration, and everyone thought this helped streamline the review process tremendously, from both the managers' and the partners' point of view."*

And if he had to pick one thing that he personally thinks made the switch to UltraTax CS worthwhile? *"The time saved in the workflow process,"* he said. *"But I also appreciate the fact that I now have more staff that can step up and take on additional responsibilities, because they understand the process and the program better."*

Does Wolfe have any words of wisdom for anyone who's undecided about changing from their current tax software to UltraTax CS? *"For someone who's thinking of switching, I would tell them that one of the best aspects of UltraTax CS is the support. The support reps are great about always getting back to us with an answer. UltraTax CS has not only made our processes so much more efficient, it's raised our staff's game tremendously. All in all, it was a much easier change than we had ever anticipated."*

"There seem to be a lot of reporting and practice management features that are great for larger firms, so I'm very excited about the future of UltraTax CS—and about our future with UltraTax CS. In the first year we were busy learning how to use the software, so I couldn't appreciate all the 'extras.' But now I see the reports, comparisons, and so on that we can generate from the program, and it makes me really eager to find out all the things we'll be able to do with UltraTax CS as time goes on."

