

RESPONSIVE, RELIABLE SOLUTIONS

Cloud-based solutions keep staff and clients connected—no matter what Mother Nature may bring.

When Hurricane Sandy struck in October 2012, **WithumSmith+Brown, PC**, was hit hard. The firm has 13 offices in multiple states, primarily in New Jersey, and lost power and connectivity in nine of them because of the storm.

"If we didn't have cloud-based applications in our business, we wouldn't have been able to function," says Jim Bourke, CPA, a partner and the firm's chief information officer (CIO).

"But wherever they were—as long as they had Internet access—the staff had access to all our client files and source documents."

Bourke considers GoFileRoom and GoSystem Tax RS mission-critical applications for the firm. Hurricane Sandy only underscored the value of working with cloud-based applications like these.

"If our client files and source documents had been stored inside our brick and mortar operations, we would never have been able to be as connected to our clients during that time," he explains.

Then again, Bourke says he has "a-ha moments" like this nearly every day. *"I travel several times a week. My clients don't have a clue where I am and, quite frankly, they don't care as long as I'm able to take care of them,"* he says. *"That's the a-ha moment that happens all the time."*

CONTENT MANAGEMENT MADE EASY

At WithumSmith+Brown, every piece of information that comes into the firm is fed into GoFileRoom—including tax, audit, consulting, and in-house documents, plus manuals. For example, when a client drops off personal tax information, everything is scanned into GoFileRoom for use in other applications.

"It's easy for our staff, especially since some of them never saw a red folder in their lives," Bourke says. *"Some people who have been in the business a long time have a difficult time migrating to content management systems, but not here. One of my partners is in his 80s and he's fully embraced GoFileRoom."*

In fact, he says the firm could not exist without GoFileRoom. *"It's a great tool that allows us to be responsive to our clients,"* Bourke explains. *"The portal that lets us collaborate securely with our clients is one of the features I really like."*

Staff members are issued smartphones, so they're able to access documents and address client requests promptly. Bourke attributes the firm's low client turnover rate to this quick response time, and the technology that makes it possible.

"We are a much more efficient firm than we were when we used physical files," he says. *"It's so important that CPAs embrace technology—especially cloud-based applications. I think that's what really sets firms apart."*

GOFILEROOM



WITHUMSMITH+ BROWN, PC

Jim Bourke, CPA

FIRM FACTS

BASICS—

With 13 offices in multiple states, primarily New Jersey, WithumSmith+Brown, PC, has a staff of about 500 professionals. The firm serves a wide range of industries with expertise including accounting and auditing services, tax compliance and planning, business investigation, strategic growth markets, and expert consulting services, as well as tax services for businesses and individuals.

WEBSITE—

The firm provides extensive online resources including news and information, financial tools, and tax tips at withum.com.

SOFTWARE—

WithumSmith+Brown considers Thomson Reuters' GoFileRoom® and GoSystem Tax RS® to be "mission critical" cloud-based applications.

CULTURE—

WithumSmith+Brown, PC, has a youthful, dynamic culture—and the firm's not afraid to show it. In fact, they've produced a number of videos that show exactly what they're made of.



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FIRM FACTS CONTINUED

"There are some old-school professionals who just don't think CPAs should be dancing around in streets doing videos, but we have a great time and our staff absolutely loves it," says Jim Bourke, CPA, a partner and the firm's chief information officer (CIO).

One of the videos was filmed in the streets of New York City and featured every member of the staff, all the way up to managing partners. *"We used it to attract young professionals and we've had extreme success with it,"* Bourke says.

See for yourself at
WithumSmith+Brown, PC's
YouTube channel
youtube.com/user/WithumVids

THE FUTURE OF TAX AND ACCOUNTING SERVICES, TODAY

WithumSmith+Brown beta tested GoSystem Tax RS when Thomson Reuters was thinking about migrating the solution to the cloud. According to Bourke, the firm hasn't looked back since.

"It's an amazing application," he explains. *"As a multi-office firm, the advantage of using a cloud-based solution is that our staff doesn't have to be physically located in the office where the paper is located."*

Thanks to the combined power of GoFileRoom and GoSystem Tax RS, the firm's staff could be anywhere—at an office, at home, or in another country—and still prepare a return.

"GoSystem Tax RS helps us tackle even our most difficult tax returns," Bourke says. *"We have some high net-worth individuals whose returns are very, very complicated, and we also prepare returns for corporations and partnerships. I can't recall a single return the application wasn't able to handle."*

THOMSON REUTERS HAS A VISION

Bourke adds that Thomson Reuters has always been responsive to the firm's needs, providing training, ongoing education through conferences, and an ever-expanding suite of new technology.

"Thomson Reuters is one of the few vendors I believe has a vision about the cloud," Bourke says. *"If I were starting a new firm today every single application would be in the cloud. Why risk privacy and continuity issues? In the next five to 10 years, I think everything our industry does is going to be in the cloud."*

