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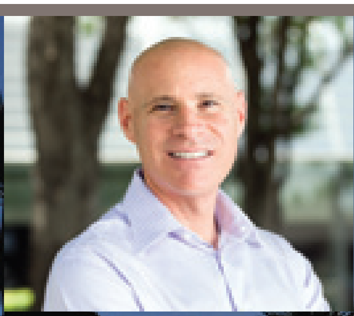
# SOLUTIONS

TIPS, TRENDS, AND CONNECTIONS FOR USERS OF THOMSON REUTERS SOFTWARE
ISSUE 2 | 2014



PETER GURIAN BELIEVES IN TECHNOLOGY

## A UNIQUE MODEL

Single fee, several services—it's an equation for success for the Gurian CPA Firm.

**PAYROLL PRIMER**
COMPLIANCE TIPS TO KEEP YOU IN THE CLEAR

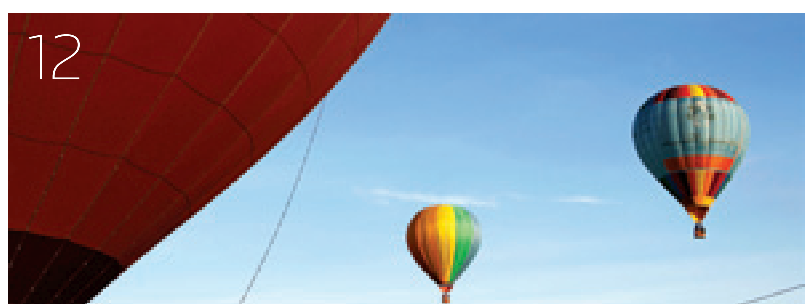
**HELP YOURSELF**
3 SITES THAT SUPPORT USERS OF CS PROFESSIONAL SUITE PRODUCTS

# SOLUTIONS

ISSUE 2 | 2014



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# Building Opportunities in the Age of Partnership at SYNERGY 2014

Today, we live in a world where technology enables us to do just about anything with a few mouse clicks or swipes on our notebook PCs, tablets, or smartphones. My kids can't even remember a time when it took a live person to rent a movie, make a bank deposit, or order a pizza.

Just the other day, I asked one of my 8-year-old twins to come along with me for some shopping. His response was, "Dad, I'm a little tired. Why don't you just order what you need online?" My kids have grown up in a world where data, information, and general connections are at our fingertips 24-7. And the technological changes continue to come at an accelerated pace.

But even in today's rapidly changing, highly connected, digital world, nothing can match the energy, the enthusiasm, and the ideas of an in-person event like our SYNERGY users' conference. Technology just can't provide the face-to-face interaction, the networking opportunities, or the lively discussions around technology efficiencies, marketing strategies, and general practice management and firm development.

For me, SYNERGY is about partnerships above all. For a few days, attendees don't see each other as competitors, or customers, or vendors, or salespeople. We're all partners, working to elevate the accounting profession as a whole. It happens at the keynotes, at the roundtables, at the special evening event, and everything in between. And it never ceases to amaze me.

The conference gets bigger and more popular every year, even as our daily lives become more automated. That tells me that we value partnerships and collaboration more than ever. There's simply no substitute for hundreds of like-minded professionals gathered together in one place.

I hope you'll be joining us at this year's SYNERGY conference, scheduled for November 5–8 at the Gaylord National Resort & Convention Center near Washington, D.C. We'll enjoy three days of networking, new ideas, and tips for embracing change and tackling challenges with partners like RootWorks CEO M. Darren Root, CPA.CITP, CGMA, and firefighter and world-champion adventure racer Robyn Benincasa.

The Age of Partnership is leading us to bright days ahead. I'll see you at SYNERGY. In the meantime, I'd like to wish you a prosperous fourth quarter.

Regards,

Jon Baron
Managing Director, Professional Segment,
Tax & Accounting, Thomson Reuters

## CS Professional Suite®

**ACCOUNTING & AUDITING**
Accounting CS®
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Engagement CS®
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FileCabinet CS®
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Planner CS®
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**WEB SERVICES**
SaaS for CS Professional Suite
Virtual Office CS®
Web Builder CS®
NetClient CS

# New Blog Series Digs Up Facts on Data Mining

During these days of (relative) quiet leading up to tax season, it's a great time to take a step back and think of new ways to generate additional revenue for your firm. UltraTax CS users already have a powerful way to do just that: the data mining capabilities included in the software.

Data mining uses data that's already stored in UltraTax CS to pinpoint existing clients who could benefit from additional services. Powerful searching and filtering features make it easy to identify the right clients, and automated email and mail merge tools provide a quick way to contact them and gauge their interest.

If you'd like to learn more about using your UltraTax CS data mining capabilities, Jordan Kleinsmith, Enterprise Product Manager, has written a series of blog articles with step-by-step tips on how to use data mining to find and contact clients who may be interested in value-added services. In the series, Jordan explores a variety of possible scenarios, such as finding clients who may be subject to required minimum distributions, identifying self-employed clients who might benefit from opening a retirement account, taking a look at sole proprietors who could benefit from reorganizing as an S-corporation, and more.

You can check out the blog articles at **CS.ThomsonReuters.com/DataMining**.

# Hire Your Family, Lower Your Taxes

Employing family members can be a smart tax move for business owners.

Hiring family members as employees can lead to significant tax savings. And in many cases, those savings extend to the family members as well as the business owner. Sole proprietorships and corporations are both entitled to tax savings when they hire family members, but the amount of savings varies according to business type.

**SOLE PROPRIETORSHIPS:** Sole proprietors stand to save the most when they employ family members. They're entitled to special savings when they employ either a child or a spouse.

- **Employing children:** Sole proprietors who employ their own children are exempt from paying Social Security tax and FICA on their wages until the children reach 18. They are also exempt from paying FUTA tax until the children turn 21. Plus, employers can deduct any wages paid to those children from their net income for tax purposes. The children are exempt from paying FICA as well.

- **Employing spouses:** Employing a spouse offers some significant advantages, including savings on FICA tax. When a sole proprietor employs a spouse who also has another job outside the family business, the income from the other job counts toward the sole proprietor's FICA limit on a joint income tax return. So the sole proprietor may see his or her FICA tax burden reduced.

Employing spouses can also open new health insurance options. This stems from the fact that the owners of sole proprietorships are not permitted to have health insurance premiums automatically deducted from their wages, nor are they permitted to deduct health insurance premiums from their taxable income. However, this rule doesn't apply to the spouses of sole proprietors. So, as an employee of the sole proprietor, the spouse could sign up for the company's health insurance and include the sole proprietor on the policy.

**CORPORATIONS:** Corporation owners who employ their own children under 18 can deduct wages paid to those children from their income taxes. This applies up to the earned income limit after which the child would have to file an income tax return. Last year, this limit was $6,100.

Hiring family members can be more than just a source of trustworthy help; it can also result in significant tax savings, especially for sole proprietors.

Detailed information about the tax implications of hiring family members is included on the IRS website, at **IRS.gov/Businesses/Small-Businesses-&-Self-Employed/Family-Help**.

# Darren Root, CPA and National Thought Leader, Publishes New Book: *The Intentional Accountant*

Developed for the accounting profession, the book offers a clear roadmap and inspiration for practitioners to transition from accounting technicians to thriving entrepreneurs.

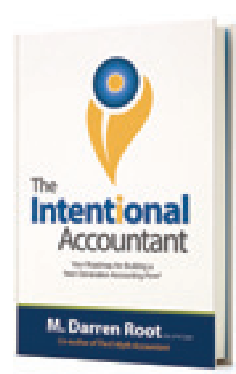
*The Intentional Accountant* strives to "empower bean counters to become better entrepreneurs," according to Darren Root, CPA.CITP, CGMA and CEO of RootWorks.

The book maps out a pathway for independent accountants to go beyond merely working at a job and to create the vision and organizational structure necessary to build a true enterprise.

It offers a practical, end-to-end roadmap of the strategic process and methods that not only transformed Root's CPA firm, but also changed the lives and personal fortunes of hundreds of practitioners and shareholders in accounting firms nationwide.

"My goal in writing the book was to share my own journey along what I call the Intentional Accountant Continuum™—from accounting technician to entrepreneur," explains Root. "My hope is that the book will inspire and motivate others to build their own Next Generation Accounting Firm®, lead as a true entrepreneur, and live a balanced life."

**ABOUT THE BOOK:** *The Intentional Accountant—Your Roadmap for Building a Next Generation Accounting Firm®*
By Darren Root, CPA.CITP, CGMA
Publisher: RootWorks LLC
Publication Date: May 9, 2014
Cost: $9.99—e-book; $19.95—paperback
Available in Kindle format




To order your signed copy of the book, visit **RootWorks.com/The-Intentional-Accountant**.

# A Consummate Coach

**MEET BRIAN WRIGHT,** *manager of Accounting & Practice Support for Thomson Reuters. He joined the company 14 years ago as a support representative. He's worked in support, training, consulting, and professional services. At the beginning of this year, he started his current position, which largely involves optimizing staff and user performance.*

Q **SOLUTIONS: Much of your career with Thomson Reuters has revolved around helping customers. Is that right?**

A **BRIAN WRIGHT:** Yes. Even though I don't interact with customers now like I used to—and I miss that—my day-to-day work involves making sure we're properly staffed to meet our clients' needs. That includes educating users about the resources that are there to help them be more efficient with our software.

**Can you provide an example of one of those resources?**
We created a tool called our Help & How-To Center. It's a way we can communicate known issues or other information relevant to our products that customers can use to search for answers on their own. We're still here to provide customer service if they want it, but a lot of users have said they just want us to tell them how to fix things themselves.

**How do you maintain a focus on customers while working with staff?**
I always try to bring the clients' stories back to our company, to make sure our staff understands how they're using our technology and what happens in a user's office when something isn't working the way it should.

**What gives you the most satisfaction at work?**
Seeing the professional growth and development of my staff and the customers we serve. Everyone has the ability to grow beyond where they currently are, and I take pride in helping them do that.

## HEAD IN THE GAME

**Life philosophy:** "The most important play is the next play. I learned that from playing football since I was 8 years old and coaching it for 20 years."

**Major influences:** Wright says his father, Percy Wright, and his high school football coach, Paul Test, taught him enduring lessons about character, hard work, dealing with adversity, teamwork, and individual accountability.

**Paying it forward:** Wright passes on what he's learned to his colleagues and his three children, with whom he spends most of his free time with, along with his wife, Theresa.

# Running Fast—and Smart

**One firm says goodbye to growing pains and hello to greater revenue and efficiency with the help of Practice CS.**

Steven M. Ellard, CPA, has been in business in Brewster, Mass., since 1991. Things were going great at the firm—in fact, the practice was growing. But as the firm added more clients, the efficiency just wasn't where it needed to be.

Already a fan of Payroll CS and FileCabinet CS, owner Steve Ellard decided to implement more Thomson Reuters software, starting by going live with Practice CS in January 2008.

"It's probably the best thing we ever did," Ellard says. "Nothing would get done in this office if Practice CS wasn't running."

Before Practice CS, he was tracking everything in Microsoft® Outlook® and using to-do lists. "It just wasn't working," says Ellard.

"Now every project that comes in the door is tracked through the system until it goes back out the door."

He says Practice CS is the first program everyone in the office starts up when they come in. The firm uses the project management, client management, and staff management components of Practice CS to track every phone call, every email, every interaction, and every step in the workflow.

"When the staff logs into the dashboard they can see right away what projects and tasks are assigned to them," he explains. "If one of us isn't there when a client calls with a question, any member of the staff can quickly read through the interactions and take care of the client, which is great from a customer service standpoint."

The firm now has "pretty much all the software" that's part of the CS Professional Suite,  Ellard adds, which means optimal integration. All these streamlined processes have given the firm's efficiency a big boost.

"It's the cornerstone of everything," he says. "For example, we bill our payroll clients through Payroll CS and it automatically pushes the invoice over to Practice CS so we can capture it and keep it recorded. We're not duplicating efforts."

"We're really happy with everything," he says. "I couldn't even imagine running this firm without Practice CS."

**PRACTICE POINTS:** Ellard says revenue has tripled since 2007, while the firm has only needed to double its staff over the same period. Learn more about Practice CS at **CS.ThomsonReuters.com/Practice**.

# EXPLORING

## uncharted territory

For Gurian CPA Firm, the key to success has been to never stop searching for better ways to get the job done.

Peter Gurian, CPA, considers it an advantage that he never worked at a CPA firm before he started his own practice. He's never been tied to doing things "the way they've always been done."

As a result, his company—Gurian CPA Firm in suburban Dallas—has consistently explored new territory and embraced innovative ways of doing business.

Gurian's open-minded approach has been integral to the firm since he founded it in 2003. He started with no clients and no practical experience as a CPA. But he did have a vision.

"It seemed to me there was a hole in the CPA market," he explains. "The firms out there were either geared toward mom-and-pop companies or much bigger companies, and they didn't offer a whole lot of advice or services beyond tax returns."

That vision became even clearer as Gurian found himself searching for someone to handle his firm's payroll and someone else to do the bookkeeping. He was also frustrated by never knowing how much his own CPA would charge him every time he got a bill.

"That's when I realized that maybe what I needed to do was go out to companies and offer them a full range of services for one set price," he says.

## FORGING NEW PATHS

Establishing Gurian CPA Firm as an all-inclusive accounting practice that serves clients for a single fee has paid off.

The firm, which has eight full-time employees and, at the moment, two part-time interns, brings in $750,000 in annual revenue, with 53 percent net profit. Gurian says he has little basis for comparison since he never worked at a CPA firm, but can't deny that he's happy with his profitability.

About 50 percent of the firm's business is accounting and payroll services and the other half is tax services. Roughly 75 percent of the firm's clients are businesses.

## 60/20

**Before Accounting CS Payroll, the firm would spend about 60 hours per year preparing and processing 941s. Now it takes just 20 minutes per year, saving the firm an entire workweek, and then some.**

## FIRM FACTS

**BASICS:** Established in 2003, Gurian CPA Firm is based in Addison, Texas, a suburb of Dallas. With a full-time staff of eight, the firm offers a complete range of services for businesses, including accounting, payroll, strategic business planning, and tax services. The firm also serves individuals with tax planning, financial planning, and estate planning.

**WEBSITE:** The firm offers a wide range of services—including financial tools, reference materials, and secure client portals—at **gurianco.com**.

**SOFTWARE:** Gurian CPA Firm uses the entire CS Professional Suite, with the exception of Engagement CS, along with other software including QuickBooks®.

Although Gurian continues to operate the practice on a fixed-fee basis, he's willing to bill clients however they prefer. He tailors every aspect of the firm's services to the needs of each client.

"I'm more open to how the client wants to work instead of forcing my philosophy on them," he says. "I offer them several different options for doing what they want to get done and find the best one to suit their needs. Of course I'll give my advice, but in the end it's their decision and I respect that."

Gurian uses the same approach with his staff, which he relies on heavily. In fact, he says, he's able to take plenty of time off because he places so much trust in his team.

"You have to have good people working for you," he says. "I encourage the staff to come up with better ways of doing things. I have no issue with someone saying my idea stinks. The best idea is the best idea, no matter where it comes from."

What's more, Gurian makes the firm a pleasant place to work. He runs his firm like a business, not a service provider, keeping his staff working at about 80 percent capacity. Doing so is as good for employee satisfaction as it is for the firm's bottom line.

"It's like a factory," he explains. "If you run it at 100 percent capacity you can't take on a large order when it comes in, and it's demoralizing to the staff to work them that hard all the time. This way, we have breathing room to innovate and take on interesting work when it comes in."

## VENTURING INTO INNOVATION

Given his background in tax technology, it's not surprising that Gurian is a big believer in technological solutions. The practice uses the entire CS Professional Suite except for Engagement CS, only because the firm doesn't perform audits.

He admits the transition to Thomson Reuters software took some effort—the staff was at 100 percent capacity during the conversion, which coincided with tax season—but says it was absolutely worth it.

Before Accounting CS Payroll, for example, the firm would spend about 60 hours per year preparing and processing 941s. Now it takes just 20 minutes per year, saving the firm an entire workweek, and then some.

Monthly compilations are another example. Because Accounting CS and UltraTax CS are directly integrated, it saves the firm hours of data entry. In fact, there's no data to enter at all. Plus, the firm can easily create customized financial statements to address industry-specific requirements.

"We work with a lot of restaurants, for example, and before we weren't always able to create the reports they needed," Gurian says. "Now, once we've created custom reports in the system, we literally just have to push a button or two and it creates the financial statements in one fell swoop—and puts them up on their secure online portal."

Having been paperless for years, the firm is very comfortable with its workflow. Every incoming document goes into FileCabinet CS and flows seamlessly through the integrated system. Gurian says this has saved the firm hours of duplicated effort and eliminated countless errors.

"For instance, if a client says, 'I want my direct deposit to go into this account instead of that one,' we just enter it into the notes," Gurian says. "When I open UltraTax CS I have it set for the notes to pop up so what I need to do is right in front of me."

With both technology and workflow processes, the practice is constantly seeking ways to be even more efficient and provide superior service to clients. In fact, although the firm's workflow runs smoothly, Gurian recently went through all the firm's processes to fine-tune them.

"Because I come from a heavy software background instead of a CPA background, I just think it makes sense to work with what the software can do, which includes making sure you're maximizing efficiency," he says. "I consider us to be pretty progressive as a firm and I like to think we're constantly evolving to improve our business and the service we provide our clients."

## OFF THE BEATEN PATH

There's a good reason why Peter Gurian doesn't rely on other CPA firms for inspiration: He didn't start his career as a CPA.

He studied accounting in college—earning a master's degree in accounting—after his fledgling career in the U.S. Air Force was cut short by a medical retirement.

After a fellowship at Price Waterhouse, Gurian worked for Arthur Andersen for a couple of years in their tax technology group, working on tax software. He went on to jobs working with Oracle software, where he gained experience in software coding, databases, financial software, and accounting.

With a partner, Gurian established a technology consulting firm they ran for six years before selling it to another company. It was then that he decided to establish Gurian CPA Firm.

"I was a CPA, but I'd never worked as a CPA," Gurian explains. "It was a little daunting at first, but I think it benefited us because I had to figure things out on my own instead of just doing what worked for someone else."

## SEEING THE SIGHTS

Ever since he served in the U.S. Air Force and spent five years in Japan, Peter Gurian, CPA, has loved to travel.

Because he runs his firm so efficiently and trusts his staff to get the job done, he can take plenty of time off to satisfy his wanderlust.

Gurian and his wife have traveled extensively, including all over Europe, much of Asia, the Grand Canyon, Chile's Atacama Desert, and Peru's Machu Picchu mountain range, just to name a few. Still on his bucket list are destinations including Africa, Australia, and New Zealand.

During his travels, Gurian indulges another favorite activity: photography. In fact, his firm's office walls are adorned with landscape photos from his journeys.

"People tell me they're good, but of course I look at them and see all the flaws," he says. "But I really enjoy it. It's something I was very into as a kid and then I stopped doing it until three or four years ago. Now I'm playing with it and it's a lot of fun to see the photos on the walls at work."

# Payroll PRIMER

Do you provide payroll services to clients? These compliance tips can help you stay in the clear.

Let's face it: Payroll compliance isn't easy. After all, that's one of the reasons clients hire you to handle payroll for them. Review these common sources of confusion to protect your clients from problems and penalties.

## MINIMUM WAGE

Changes are coming, due in part to the federal government's pushing for a higher minimum wage, says Jim Paille, director of operations, myPay Solutions. "Some states are trying to get ahead of a federal minimum wage increase and are implementing a graduated increase over the next three to five years," he explains. "But they're not all changing at the same time or on the same date, so that's a difficult compliance issue."

## EMPLOYEES VERSUS INDEPENDENT CONTRACTORS

They are not to be confused. Incorrectly classifying someone as an independent contractor instead of an employee can cost employers big money and even possible jail time.

When in doubt, your best bet is to classify someone as an employee. If you really want to classify people as independent contractors, you can't dictate how much time they spend working or how they do the work. You also can't give them any company-paid benefits and shouldn't pay them an hourly rate; pay them on a flat-fee basis instead.

"The most common violation is a person who retires from a company and comes back the next day as an independent contractor," Paille says. "You can't do that if they're going to be doing the same job."

## FRINGE BENEFITS

This is a tricky one for most employers, but the basic rule is that anything you give your employees is taxable unless the government has deemed it otherwise because it doesn't have a cash value. Here's one example: Giving employees an actual turkey for Thanksgiving is tax-exempt, but giving them a gift card to buy a turkey is not, because the gift card is exchangeable for something that has value.

"Gift cards are always taxable," says Paille. "That's something many companies violate." Another common mistake companies make is thinking anything valued under $75 isn't taxable. The rule they're confusing it with is that you don't have to provide a receipt for business deductions under $75.

## OVERTIME PAY

Employees who earn overtime must be paid time-and-a-half for every hour they work over 40 hours in a single week. Even if they're paid bi-weekly, time worked over 40 hours one week can't be applied to the second week to make it an even 80 hours over the two weeks.

Payroll compliance can be a tough job, but somebody's got to do it. Your clients will thank you.

## STAY CURRENT

How can you keep tabs on the rules of payroll compliance?

If you use the myPay Solutions payroll service, all updates are automatically applied—including reports that support the ever-changing payroll needs of you and your clients. And the comprehensive content of Checkpoint keeps you up to date on the latest regulations and news.

Want to know more? Check out one of our payroll compliance webcasts. Details at **CS.ThomsonReuters.com/Events**.

# Help Yourself to These Helpful Resources

As part of our continuing mission to bring you the most useful, easy-to-access content available, we've been building up the online resources for CS Professional Suite users. Whether you're looking for the recording of a webcast you weren't able to attend, a demo of that new product you're considering, or tips for using certain features of your software, there's a place for that: **CS.ThomsonReuters.com**.

The URLs below will take you to four self-service resources with invaluable information about your CS Professional Suite products:

- **CS.ThomsonReuters.com/Events**
  Here's where you'll find schedules and links (where appropriate) to recordings of past webcasts and upcoming online events, trade shows, and seminars.
- **CS.ThomsonReuters.com/Demos**
  Thinking about moving from CS Professional Suite Accounting to Accounting CS? Wondering whether FileCabinet CS or GoFileRoom is a better fit for your firm? Make this page your first stop for demos, videos, and trials that let you try before you buy.
- **CS.ThomsonReuters.com/Video**
  Libraries are for learning, and our Video Library is no exception. Find everything from product support tips and procedures to video interviews with other CS Professional Suite users.
- **CS.ThomsonReuters.com/Community**
  Stop in here for informative blogs (including The Payroll Report), and the ARNE online community, itself a treasure trove of information from other ARNE users.

# The Help & How-To Center Spotlight: **Useful Links**

Every page in the Help & How-To Center has a box on the right side that features helpful links, such as bulletins, alerts, popular topics, contact information, and a feedback form. For instance, these are the links you'll find for UltraTax CS:

- **Alerts and Notices—**Stay up to date on topics like e-filing, product news, and more.
- **Electronic Filing—**View info on the opening day of e-filing, access state e-filing info, visit our E-file Help Center, and more.
- **Most Popular—**Discover the topics that are being viewed the most by other Help & How-To Center visitors.
- **Release Schedule—**Find out which version of UltraTax CS is currently available.
- **Contact Us—**All the info you need to email or call Support, as well as a schedule of Support hours.
- **Leave Feedback—**Tell us about your Help & How-To Center experience. Are the articles helpful? Is there something else you'd like to see? Let us know!

Visit **CS.ThomsonReuters.com/Help** to check out the accompanying links for your own products.

## MEET YOUR SUPPORT REP

**Paul Kelley, Senior Support Specialist, Training & Consulting**

Senior support specialist Paul Kelley loves to teach every bit as much as he loves to learn.

Paul started with Thomson Reuters as an intern in December 2006. He enjoys helping users navigate through their software changes, and has drawn on his experience as an UltraTax CS, FileCabinet CS, and Web Services support representative, and as a subject matter expert for UltraTax CS, to train hundreds both online and in person.

"Training is very rewarding for me," says Paul. "I get to help firms making a major change to their business learn about features that can save them both time and money."

Not surprisingly for someone who loves being a trainer, in his free time Paul loves to learn and try new things. Over the years he's headed out west to try his hand at kayaking, mountain biking, downhill skiing, and hiking. Recently, he's actively participated in both yoga and golf. To those who wonder what two such different activities could have in common, he says, "They actually complement each other very well. When my golf game is poor—which it frequently is—I can use the yoga session to stretch out, relax, and not think about golf anymore."

*Paul Kelly (at right) enjoys a day on the water with good friends Mike and Tracey.*

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# SYNERGY 2014

The 34th Annual Thomson Reuters Users' Conference for Professional Tax & Accounting Firms

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- **Earn up to 19 CPE credits**
- **Network with industry professionals from around the country**
- **Attend a special evening event—The Smithsonian Air & Space Museum**
- **PLUS: available for your spouse/ guests, a tour of Abraham Lincoln's Washington**

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