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Success and Comfort

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Andrea Parness • Apr. 13, 2017



Like many of you in the accounting profession, I attend several accounting and technology conferences each year to listen to industry leaders and network with my peers. I read countless articles and survey result reports about the future of accounting and business and pick the brains of the accounting conference sponsors.

It was the last week of April 2015. I was a participant in a special mini

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advice and financial statement preparation and analysis. We were processing historical data as we worked from the clients' check register, credit cards, bank statements and their internal reports all via server-based tax and general ledger software.

I would love to tell you it was easy to make the switch and that we have 100% conversion and implementation. It was not and we do not, but the results were well worth all that hard work.

With the support of my staff, our wonderful software providers, and training from experts in the use of the cloud accounting software we were able to convert most of our traditional clients. They are the winners who are now reaping the benefits.

I value the opinion of my staff, so my first step was to share my vision with them – I know this would never work without complete buy-in and commitment from them. I was teary eyed at the end of the first two-day session when my last team member (typically skeptical and unyielding) agreed to the training and promised to support the conversion.

With the help of my staff we reviewed and chose the cloud based accounting software we would use for our clients. We evaluated security first then ease of use for our clients. We made sure that the software company was committed to excellent customer support, continuous research and upgrades. We understood that in order for the new system to work our clients and their bookkeepers would need to be comfortable with the new system and happy with the results. We needed to be able to use the data to analyze their business results so we could help them better meet their goals.

My team and I recently attended an advanced training course for our chosen cloud-based software system. During the session, the trainer mentioned that she had

visited our firm and taught us how to set rules and preferences. I told her that she

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My advice: move your firm's accounting system to the cloud, you will see the benefits and love it. Then you can share your experience with them.

As a New York City based CPA firm we review and prepare Federal, NYS and City corporation and personal tax estimates each quarter. Our new system allows us to review and fine tune these estimates every quarter. I love to tell the story of December 2015 when my team and I could accurately calculate the taxable profit to December 11th and then estimate the minimal activity for the remainder of the year. Our clients were able to pay in an adequate fourth quarter estimate and plan for either their March or April tax or pension payments and give out bonuses – it was great!

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Andrea Parness, CPA, owner of [A. Parness Company](#), a small CPA firm based in Belle Harbor, Queens, NY, has been in public accounting for over 30 years. Prior to starting her own firm in 1985, she was a partner in a small CPA firm located in Great Neck, NY and worked as an internal auditor and financial analyst for a Fortune 500 company. She is a member of the National Conference of CPA Practitioners (NCCPAP) Nassau-Suffolk Chapter, the AICPA and the New York State Society of Certified Public Accountants (NYSSCPAS). She currently serves on the Long Island Tax Symposium Executive Committee. She also services as the Executive Vice President of the NassauSuffolk Chapter of NCCPAP and is a board member of the Education Foundation of the National Conference of CPA Practitioners (NCCPAP). Andrea is also a member of the Intuit ProConnect Tax Council.

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