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FIRM MANAGEMENT

When Starting Your Firm, Consider Your Future

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In 1995, Kelly Nokelby was a new tax practitioner. As with others just starting out, she was money conscious and wanted a software that wouldn't put a strain on her budding business before it even got off the ground. But Kelly was also thinking about her firm in a year, five years, 10 years and further down the line. She wanted a tax software that would grow with her firm, so she turned to a trusted partner.

"Actually, the Intuit name is why I chose to go with ProSeries. I was familiar with QuickBooks, so there was a natural progression. Intuit has been around forever and they aren't going anywhere; the stability and continuity is always there," she said.

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"If I've ever had questions I can ask not only Intuit, but other users. And I found that the people at Intuit genuinely care about our interaction with the product and the

company. They want us to feel important. I always feel that way whenever I have called. I've always felt that I am a valued person even though there are thousands of customers," she said.

As her practice has grown, so has Kelly's software. Over the years, the product enhancements seemed to meet her needs before she knew she had them.

"Intuit has always known what I needed before I did," said Kelly. Features like, "Where do I Enter" allows her to search a keyword and it brings her directly to that location in the software. "This is very user friendly, which is important because during tax season and you are doing high volume, you can get around easily in your software," she said.

Kelly continued, "Intuit has always had an idea ahead of time what we are going to need or what needs to be done. They've always been forward-thinking and able to glimpse into the future to know what the needs of the practitioner are."

Kelly shared that the intuitive program features save her valuable time in season. Quick Data Entry helps her update the depreciations for many of her clients by allowing her to toggle between a form based view and an input based view and then ProSeries automatically flows the data to the fields of the actual forms.

"It is helpful, because most of my returns have between 80-100 assets and I have to update them every year."

She also shared, "I like that when I am done with a return, I am able to run the diagnostics to see if I've missed anything. I get alerts. I don't have to worry if the returns I am preparing are correct. ProSeries has always been dependable and, in my opinion, is just an all-around great program."

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