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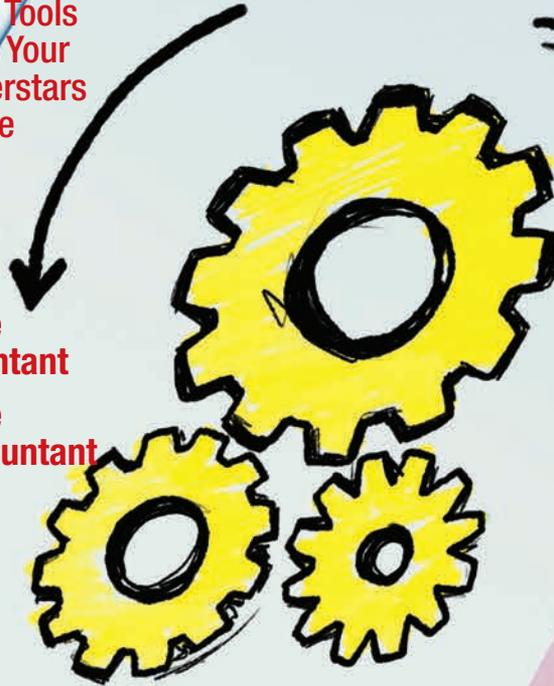
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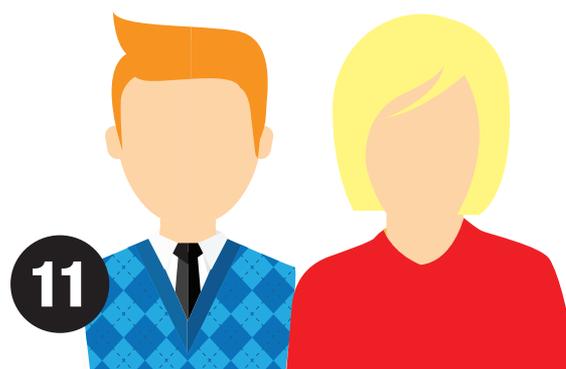
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Publisher: Barry Strobel

Editor-in-Chief: Gail Perry, CPA

Managing Editor: Isaac M. O'Bannon

Assistant Editor: Tajja Jenkins

 Columnists: David McClure
 Doug Sleeter
 Jim Boomer, CPA.CITP
 Kristy Short
 Randy Johnston
 René Lacerte
 Roman H. Kepczyk, CPA.CITP

Art Director: Rhonda Cousin

Site Manager: Lester Craft

Media Production Representative: Barb Evenson

Audience Development Manager: Terri Pettit

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 Practice Advisor, (ISSN #2160-8725 (print), ISSN #2160-8733 (digital); USPS #017-576)
 is published six times a year (February, April, June/July, August, October and December)
 by Cygnus Publishing, LLC, incorporating two editions known as CPA Practice Advisor
 and NSA Practice Advisor, 1233 Janesville Avenue, Fort Atkinson, Wisconsin 53538.
 Periodicals postage paid at Fort Atkinson, WI 53538 and at additional mailing offices.
 Printed in the U.S.A.

 Send all subscription inquiries or change of address to:
 Practice Advisor,
 PO Box 3258, Northbrook, IL 60065-3258.
 Phone: (877) 382-9187 (toll free); (847) 559-7598 (local)
 Fax: (847) 584-9453
 Email: Circ.CPA@meda.com

 Subscription Rates: The basic annual rate is \$3, based on qualifying
 associations of 10,000 or more public accountants that may also subscribe
 for all their public accountant members (certain restrictive covenants apply) for a basic
 subscription rate of \$9 per member for a three-year subscription.
 One year subscription for all others: USA - \$48; CAN \$70 GST; INT'L \$99 GST
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Farm Stand Honor System

Call me naive if you must, but I grew up in the Midwest where there's a lot of trust. We smile and say hello when we pass strangers on the street, we expect people to have good manners and are rarely disappointed, we ask each other personal questions because we genuinely care about learning about each other and sharing experiences, and we stop and help if someone needs a hand.

And so it's no surprise to me when I go to buy my corn and tomatoes at the local farm stand, that no one tends the stand. The farmer picks the produce each morning and places it out on the tables and then goes back to working his fields. From morning to dusk people drive or walk to the stand, choose whatever delicious produce they want to take home with them, and leave money. There are signs telling us that the corn is \$3 for a half dozen ears and \$5 for a dozen, and there's a scale if we need to weigh because tomatoes are priced by the pound. There's a metal box with a slot in the top where we deposit large bills, but if we need change, there's another box of coins

and small bills where we can take the appropriate amount of change. It's called the honor system.

As we move into a new era of remote employees, that honor system is going to be put to the test in a much bigger way, and it will probably take a bit of a beating as we find the best methods of exercising trust and providing mutual benefits in the 21st century workplace.

On the surface it makes so much fiscal sense for employers not to have to provide office space for every single employee, and for workers to be able to avoid lengthy and expensive commutes when their work doesn't require in-person collaboration.

In reality, there will be employers

who will never be able to let go of the reins and trust employees to do the job when they are not being watched, and there will be employees who shouldn't be trusted and who will game the system in many creative and yet-to-be-determined ways. But those issues already exist in the physical workspace. Who hasn't known an employer who constantly looks over the shoulders of workers who would do a better job if they weren't being micro-managed, or an employee who takes improper shortcuts or crafts the job so that co-workers carry more than their share of the workload?

That honor system isn't going to work for everyone, just as the make-your-own-change cash box might not stay full for long on a street corner in a big city where random people could just walk by and reach in for a handful of money without being watched. The key is accepting that there is not a one-system-fits-all solution and finding the right mix of tomatoes and corn and a cash box and loose change in your own business world. ●

— Gail Perry, Editor-in-Chief
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Making the Right Payroll Choices for **Your Firm** and **Your Clients**

For many accountants, payroll=plague, and should be avoided at all costs. Others have discovered that there are antibiotics, and a clean, safe way to handle payroll where there are notable recurring profits to be made while improving client relationships. Industry accountants who need accurate payroll information automated for integrated costing or benefits can self-medicate. Public practice accountants with successful collaborative accounting practices can add payroll with Human Resources (HR) capabilities. Many accountants have come to the conclusion that running a payroll system accurately and with minimal liability has become practical, cost-effective and profitable. Have you made this discovery?

No amount of reasoning, and certainly not this simple article, is likely to convince you to provide payroll services if you aren't already doing so. Profitability, better client service, more accurate information, deeper client relationships and a more valuable practice are certainly not reasons enough to consider adding this your practice if payroll services don't fit your strategy. However, if you can manage a team of people effectively, and these people know they are helping businesses with a burden that most business

owners and manager would like to avoid, there is a business opportunity waiting for your consideration.

Why On Earth Would I Ever Want To Process Payroll?

First, I'll readily acknowledge there are multiple pain points in running a payroll system. Pick one or more choices from the following list:

- liability
- remitting appropriate taxes
- submitting forms and payments in multiple jurisdictions
- compliance with payroll and HR regulations
- time consumed running the system
- extra time required for quarterly or year-end reporting
- if paper is used, getting the forms required
- acquiring all of the information accurately
- maintenance of both the applications and data
- integration to benefit systems
- simply having to pay attention to and run the system every week or every day, and
- correcting errors that have been made.

More could be named, but this type of list is what prevents most accountants from considering running a payroll system, and feeling good about outsourcing this non-core competence activity. Admittedly, large scale payroll companies like Ceridian, ADP and Paychex exist for a reason, and they have built very nice,

profitable, recurring revenue businesses. I respect and recommend these companies and their services on a regular basis when they are chosen for the right reasons. Rarely are these payroll services chosen because they are the least cost.

On the other hand, many of these pain points have been made much less painful with the current generation of software. Notable changes in the last 5-10 years include:

- Ability to outsource part or all of the payroll process eliminating the complexities and retaining the client relationship
- SaaS solutions that eliminate maintenance and updates of the software
- Employee Self Service (ESS) has reduced much of the data entry, accumulation of information, corrections, and distribution of information
- Automated Clearing House (ACH), Electronic Funds Transfer (EFT), and employee payroll cards for the unbanked have made moving funds easier
- Time capture including SaaS and mobile timesheets have made accumulating employee hours easier, and in some cases, completely automatic
- Some payroll services are willing to accept all liability, reporting and payment obligations, just like the completely outsourced payroll services, while your firm does the processing
- Systems have optimized the time used for processing by minimizing or automating more steps without compromising controls and confirming audit steps

- Processing both salaried and hourly employees has become almost automatic in some systems, with as little as one step for an entire payroll
- Heavy payroll compliance areas such as Professional Employer Organizations (PEO), Staffing, Fiscal Agents and payroll services capabilities have been added to many software platforms
- Integrated HR assists in the onboarding, compliance and termination of employees
- Accuracy, control, ease of adjustment and flexibility while complying with regulations is easier to accomplish in less time with in-house payroll offerings
- Time and costs are frequently reduced. While you may not have the appropriate skills to run a payroll system well, producing a weekly payroll, 941s and W2s has become routine and accurate and consumes minimal time.

Public accounting firms with collaborative accounting practices can add profitable recurring revenue using less expensive employees to service clients directly without increasing professional staff. Beyond increasing revenue, adding payroll and HR services can increase the value of the practice and tie clients more tightly to your firm in a way that compliance services can't. Banks learned long ago that you have to have at least three service offerings to keep customers from switching. What three services do your clients use every month, or at least every year?

A few examples of software providers may help you see the possibilities. For example, long time software company CYMA offers payroll solutions across many different businesses, from PEO, Staffing, Fiscal Agents, Corporate, Not for Profit to Payroll Services companies. Having the upfront capability provided by Web-Based Employee Self-Service (ESS) which includes pulling hours into Payroll and then pushing to AR



Randy Johnston is executive vice president and partner of K2 Enterprises and Network Management Group, Inc. He is a nationally recognized educator, consultant and writer with over 30 years' experience. He can be contacted at randy.johnston@cpapracticeadvisor.com.



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FROM THE TRENCHES

By Randy Johnston

the invoice for payroll services all from one company is a big improvement in payroll. As CYMA has added HR, PPACA compliance reporting, Advanced Workers Compensation Reporting/Billing, Staffing Payroll & Billing, Payroll Billing, Client AR/EFT Enhancements, and improvements across all core accounting modules during the past year, they have vastly improved the ability of public practice accountants to provide payroll services, after the fact payroll and write-up. CYMA can be used by industry accountants for payroll, HR, inventory, and costing in addition to NFP accounting and is generally more sophisticated and faster than QuickBooks Enterprise for around the same licensing fees.

Another example includes Payroll Relief from AccountantsWorld. This SaaS based payroll system is part of the Power Practice family, and includes ESS, ACH/EFT capabilities and leave

the public practice accountant in control. From the Firm Administration Portal through the Payroll Center and Dashboard capabilities, the product was designed to help an accountant work with their clients to make payroll processing collaborative, easy and effective. Payroll Relief can be set to automatically do the following on time: direct deposit, tax deposit, e-filing, child support, alimony, and comparable deadline based tasks. When Accounting Power and Cloud Cabinet are added, the firm can offer a complete collaborative accounting solution.

An additional example of a new generation payroll system that many firms have missed is the Sage Payroll Services powered by PayChoice. This acquisition by Sage in October of 2014 makes Sage one of the largest payroll organizations in the U.S. This business unit is serving 115,000 business in all 50 states, has nearly 2

million paychecks are processed each payday, and around 300 employees. Customer Support Representatives (CSR) have the Fundamental Payroll Certification (FPC) which contributes to notable Net Promoter scores and strong client satisfaction. Sage Payroll Essentials is for 1-10 employees and includes Internet Input/Mobile Access, HR Resources/Compliance, Standard Payroll Reports, Tax Filing, and CPA GL/Tax Data Access. Sage Payroll Full Service is for 11-500+ employees and includes Internet/Phone/Fax Input, Mobile Access, an expanded HR Tool Set, Advanced Reporting, Tax Filing, CPA GL/Tax Data Access, and a dedicated Client Support Representa-

tive (CSR). Another interesting capability is the interface to the Intuit QuickBooks family. The offering may be a better payroll option for QuickBooks than those from Intuit itself.

For public practice firms, Thomson Reuters myPay or ACS Payroll runs millions of payroll checks with sophisticated outsourced payroll capabilities. With over 6,500 customers, a 120%+ growth rate year-to-date, more than 1,100 referring accountants in all 50 states while actively processing payrolls in all 50 states, myPay is a viable alternative to outsourced payroll referral when compared to ADP or Paychex. ●

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Reducing Staff Turnover: How to Recognize and Respond to Retention Red Flags

By Paul McDonald

Accounting and finance professionals with in-demand skills are finding they have many options when it comes to job offers. This is great news for candidates. However, as a manager, you recognize a rosier hiring environment means you have to work harder to keep your top talent.

Here are some retention red flags that indicate an employee may be ready to jump ship:

1. CHANGE IN ATTITUDE

An employee's deteriorating work attitude could be an indication she's considering leaving your firm. When a worker who used to approach every challenge with gusto becomes more distant, she could be entertaining job offers at other companies. At the very least, this change signals something is not quite right.

2. QUALITY OF WORK DROPS

A telltale sign an employee's mind is not on the job is when he turns in work late and at subpar quality. Though this sometimes occurs when a staffer is under personal stress, it also could be a sign he's halfway checked out and has lost interest in his current role.

3. DISENGAGEMENT WITH COLLEAGUES

Engaged workers show up to meetings, work functions and social events. A retention red flag is an employee who's frequently late or a no-show to office activities, even the optional ones, especially when she used to volunteer for assignments and was the life of the party.

4. ABSENCES

Employees who uncharacteristically take long lunches or leave early may be interviewing for other positions. The same is true of team members who have never missed a day of work except for scheduled vacations but now frequently take personal days. They could be using up their paid time off instead of losing it when they leave.

5. SHIFT IN DRESS

Has your senior accountant or financial analyst upgraded his wardrobe, and now he comes to work more often in business attire? While it's possible he's experimenting with a new look or dressing to get ahead, he also may be heading to interviews during lunch or after work.

6. FURTIVE BEHAVIOR

When you walk up to an employee and she minimizes all screens, it could be because she's looking at job postings or emails from prospective employers. While snooping is unbecoming behavior, do keep an eye and ear out for warning signs to determine whether you need to have a talk about retention or just goofing off on the job.

How to Respond to Retention Red Flags

There are several steps you can take to turn the situation around and keep top employees happy, satisfied and with your organization. Even if you don't see any red flags, you should still be proactive about enhancing your retention strategy.

1. HAND OUT RAISES

A Robert Half survey found an inadequate compensation package is the top reason good employees leave their jobs. Take a look at the wages of your most productive accountants, and compare them to the salary ranges listed in the *2015 Salary Guide* from Robert Half.

If salaries are on the lower end, bump them up before your top performers seek better pay elsewhere. It's too late to offer them a raise when they turn in their resignation letter; a counteroffer is a poor retention tool.

2. HELP BALANCE THE BURDEN

Sometimes a formerly good worker turns in

lower-quality work because he's stressed. If his work-life balance is off, offer time perks like a flexible schedule, telecommuting options, a compressed workweek or even going part-time.

If the work is too much for one person to handle, hire a new full-time employee or bring in temporary help. Let him know you're on his side.

3. SHOW A WAY UP

A key aspect of job satisfaction for motivated employees is knowing they have potential for career advancement. Ask about their career goals and aspirations and whether they're happy with their current roles and responsibilities. If a staff member feels she's hit a ceiling at the company, work with her to map out a possible career path and let her know what professional development opportunities are available.

4. KEEP YOUR DOOR OPEN

When employees feel management cares, they're less apt to leave. Have regular check-in sessions to listen to their concerns and catch retention red flags early.

5. SHOW APPRECIATION

Your top employees deserve to be recognized. If your company doesn't have a recognition program, put one in place. Bonuses and gift cards are effective, but there are also many low-cost ways to thank valuable workers and let them know you're glad they're part of the team. The best retention strategy is to be proactive — *before* star employees start sending out warning signs. But even if you see retention red flags, you still have time to turn the situation around so they'll have every reason to stay.

Regardless of how the situation turns out, avoid burning bridges. Stay in touch with high-performing professionals who leave, and they may boomerang back to your firm in the future. ●

Paul McDonald is senior executive director with Robert Half, the world's first and largest specialized staffing firm. Over the course of his 30-year career with the company, he has spoken extensively on employment and management issues based on his work with thousands of companies and job seekers.





Mobile Career Tools

By Gail Perry, CPA, Editor-In-Chief

We are covering career-related apps this month. Whether you're planning on furthering your own career, working with others as a mentor, or in a position to do some hiring, our CPA Practice Advisor community has some recommendations that will surely help you!

JIM BOURKE, CPA.CITP, CFF, CGMA, partner in charge of internal technology at WithumSmith+Brown recommends Glassdoor and states that, "Hands down, this has to be one of the best reference tools for those seeking a position with a new company." With Glassdoor you can learn about salaries and benefits and read reviews of firms and their management. "Glassdoor is very well known for their information rich site with inside information about companies directly from the opinions of current and past employees," said Bourke. "Now that data is accessible right from your smartphone via the Glassdoor app."

BARRETT YOUNG, CPA, founding member of The Green Abacus, concurs, describing Glassdoor as "one of the best websites for job seekers on the web today. Glassdoor puts the impetus on the employer to create a culture worth working in, and gives new and former employees a channel to communicate what really goes on within the company. As an employer myself, I welcome that kind of transparency and look forward to attracting top talent based on something beyond salary."

SANDRA WILEY, COO at Boomer Consulting, has been involved in human resources for decades. She

suggests Jobs by CareerBuilder for those who are looking for a job; Resume Genie – a free and effective resume builder; KPMG Go – a great app for those who are specifically looking for jobs within KPMG, and Job Interview Questions Prep – a great app, fun and interesting.

DUSTIN WHEELER, CPA, tax manager at Hawkins Cloward & Simister, says that "JibberJobber.com is a helpful tool to organize relationships and companies in a job search. The site has a community to collaborate with other users." The founder also writes a blog about LinkedIn at imonlinkedinnowwhat.com filled with useful tips.

DANIELLE SUPKIS CHEEK, CPA, CFE, CVA, and president of Houston-based D. Supkis Cheek, PLLC, suggests using a closet tracker app. There are several available, including Cloth, Netrobe, Stylebook, and Touch-Closet. Use the app to keep track of what you wear each day so you're not wearing the same outfit repeatedly with the same people. "I could see that being useful if you are going on multiple rounds of interviews with several different companies," Cheek said. "Most commu-

nication is non-verbal. It is very important to look the part of the job you want, particularly during the interviewing process. However, if you go on many rounds of interviews with different prospective employers, it can be hard to remember what you wore last time."

DAVID CIESLAK, CPA.CITP, GSEC, principal with Arxis Technology, and Paul Loftus, vice president of sales and revenue retention at Wolters Kluwer, recommend LinkedIn, which Cieslak refers to as "the most logical suspect." Loftus says that LinkedIn "has had the largest impact on how I attract, search, secure, and even retain top talent. It plays a critical role in all aspects of managing talent, from providing potential candidates insight into your firm and your personal leadership brand to easily searching your expanded network for any talent needs for your organization." ●

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A Content-Rich Website is Part of An Accounting Firm's Brand

By Mary Girsch-Bock

In today's electronic world, a website is no longer considered a luxury, but is now a necessity for just about every business, including accounting firms. But it's not enough to simply have a web presence. In order to stay competitive, a firm's website should have certain components that will work to enhance its success. These components may vary, but most likely will include some of the following:

- **An attractive, eye-catching home page.** Much like a well-designed book cover, a well-designed home page is often the very first thing a potential client sees. It doesn't matter if your firm offers top-notch professional services. A potential client may never know that if they don't get past the home page.
- **An easily located list of services provided by your firm.** The days of picking up the telephone to get information are over. Make sure you have an easily accessible list of services offered, as well as an easy way for potential clients to contact you, such as a request information form that potential clients can fill out on directly on the website.
- **A client portal.** Offering a secure, confidential method for exchanging documents is a valuable tool to offer both current and potential clients.
- **Good customization options.** No one wants their website to look like everyone else's. While using standard templates can be a valuable tool for firms when creating a website, the ability to customize those templates to give your website a unique look and feel is just as important.

The web-building products that we looked at in this issue offer a wide variety of features and options. Because of the variety of features included, it was impossible to assign a star rating to each product. While each product accomplishes the end result well, creating a website designed for accountants, they all arrive at that end result in different ways, making it impossible to rate one product against another. The products did seem to fall into one of two camps: a template approach, where users can create their own website by choosing from a variety of templates with differing styles, and those that create custom websites and make all subsequent web changes.



2015 Reviews of Website Builders

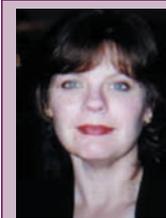
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- CCH Site Builder
- CPASites.com
- CPA Site Solutions
- GetNetSet for Accounting Firms
- Tenenz AFSB Site Builder
- Thomson Reuters Web Builder CS

This is perhaps the most important aspect to consider when choosing a web building product: If your firm frequently updates content, it may be better to be able to make changes in-house. For those that have fairly static content, hiring a firm to create and manage website content may be a better solution. Workforce is important when considering this as well. If your firm has a small staff, it may be difficult for someone to find the time to make changes on a regular basis.

One of the best ways to find the product that is a

good fit for your firm is to visit the websites of these products. Most of them offer a free trial ranging from 30 to 60 days – more than enough time to determine if the product and the features are a good fit for your firm.

While web-building products have certainly been around for a while, the products we looked at in this issue offer a level of features and functions that are unprecedented. Take a look at the products, try a few out, and be on your way to your new website – a lot faster than you may have imagined. ●



Mary Girsch-Bock

Mary Girsch-Bock began her career as an accountant in the property management and healthcare industries. She is now a freelance writer specializing in business and technology issues and is the author of her first book, several HR handbooks, training manuals, and other in-house publications. She can be reached at mary.girschbock@cpapracticeadvisor.com.

AccountantsWorld Website Relief

BEST FIT

Accountants World Website Relief is best suited to those currently utilizing Accountants World Power Practice Suite of Applications, though the product can be used as a stand-alone system as well.

PRODUCT STRENGTHS

- Complete integration with PowerPractice Suite of Applications

- Offers a comprehensive list of templates that can be customized as desired
- Unlimited number of pages can be added to website
- Offers custom forms for clients to complete online

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/12095998

POTENTIAL LIMITATIONS

- Does not currently offer an integrated tax-preparation system

month. Website Relief also comes with a money-back guarantee, if the service is cancelled within 30 days of the start date.

SUMMARY AND PRICING

An excellent choice for those using PowerPractice Suite, Website Relief is priced at \$595.00 per year, if paid annually. Firms can also choose to pay monthly, with pricing at \$59.00 per

www.AccountantsWorld.com

Build Your Firm Websites for Accountants

BEST FIT

Build Your Firm provides custom web design services that are well suited to firms offering unique and specialty services, as well as firms that do not wish to be involved in the website creation process.

PRODUCT STRENGTHS

- Extensive experience in firm management as well as custom website creation

- Easy client newsletter management allows firms to send different newsletters to different clients
- Unlimited number of email addresses can be used
- Product can integrate with WordPress blog service

POTENTIAL LIMITATIONS

- Firms have limited control over website changes

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/12096008



SUMMARY AND PRICING

Build Your Own Websites for Accountants is available in two versions; Professional and Platinum. Professional level pricing is \$83.33 monthly and includes secure file sharing for up to three users,

SEO capability, unlimited emails, mobile website design, and 1 MG of cloud-based storage. Platinum level pricing is \$99.95 per month and includes all of the options available in the Professional level as well as 4 GB of cloud storage, the ability to add additional file share users, Biz-Pay payment processing, and up to 24 credits of CPE/CE courses. Custom design for Niche websites is extra.

www.BuildYourFirm.com

CCH Site Builder

BEST FIT

Small to mid-sized accounting or tax firms that currently use Wolters Kluwer Tax & Accounting products including CCH Access Portal, which can be embedded directly into the application.

PRODUCT STRENGTHS

- Seamless integration with CCH Access Portal, as well as other Wolters Kluwer Tax & Accounting products

- Extensive selection of templates, designs, and styles, including mobile accessible sites
- Quick, easy website setup allows firms to have a web presence in hours, with users able to customize content at a later date
- Access to a large array of documents, articles, financial tools, and other content from Wolters Kluwer Tax & Accounting

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/12096006

POTENTIAL LIMITATIONS

- There is no simple, integrated blog capability within the product, although users can link to a blog hosted separately if desired

The starting price for CCH Site Builder is \$785. Pricing is tiered based on available options. Users can also sign up for a free 30-day trial to try out the system, with no credit card information needed

SUMMARY AND PRICING

A good choice for those using Wolters Kluwer Tax & Accounting products, CCH Site Builder is available in four different packages:

www.CCHWebsites.com

CPA Site Solutions

BEST FIT

Firms looking for a professionally designed website that can be easily edited when necessary, as well as firms using QuickBooks.

PRODUCT STRENGTHS

- Product is scalable, with three levels available
- Extensive selection of web designs to choose from

- Site can be easily customized as needed
- Product offers numerous client tools such as tax guides, calculators, and newsletters

POTENTIAL LIMITATIONS

- The extensive selection of product tools and features can be overwhelming for some

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/12095999



SUMMARY & PRICING

With their extensive experience in providing quality website options to accounting firms, CPA Site Solutions offers just about every feature an

accounting firm could possibly need. The Silver version of CPA Site Solutions is \$49.50 per month. The Gold version is \$69.50, and the Platinum version is \$99.50. There is no contract required, and users can choose to pay month-to-month if desired.

www.CPASiteSolutions.com

WEBSITE BUILDERS

CPASites.com

BEST FIT

CPAsites is a good fit for mid-sized to larger firms that desire a true custom site that is built from scratch.

PRODUCT STRENGTHS

- True website customization built specifically for each firm
- Varying subscription levels available to suit all prices and budgets

- Good solution for those with little time or desire to create a website

POTENTIAL LIMITATIONS

- Changes must be completed by CPAsites.com

SUMMARY & PRICING

Available in four levels, CPAsites Platinum level subscription is available for

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/12096005



\$150.00 a month, and includes the most comprehensive set of features offered. Also available are Gold Level (\$85 per month) and Silver Level (\$50 per month) subscriptions that provide

excellent features above the basic level.

A Bronze level subscription is also available at \$300.00 per year and allows users to choose one of the seven features as listed above. A year-long commitment is required from all new users, with users able to terminate after that year and keep the designed website if desired.

www.CPASites.com

GetNetSet Websites for Accounting Firms

BEST FIT

GetNetSet (GNS) is an excellent fit for small to mid-sized accounting firms. The product is available in three versions, with users able to choose the version best suited for their needs.

PRODUCT STRENGTHS

- The product is available in three versions

- Offers a good variety of website options that firms can choose from
- Custom web design is included in the GNS monthly subscription fee
- Users have the option to have the 'Guardian Webmaster' make all changes or have access to the website to make changes on their own

POTENTIAL LIMITATIONS

- No integration with tax or accounting software is available at this time

SUMMARY & PRICING

GetNetSet is a scalable product, well suited for small to mid-sized accounting firms. The Representer version of GNS is available for \$29.00 per month. The Retainer version is \$49.00 per month,

and the Recruiter version is \$99.00 per month. All versions offer a 30-day free trial, and discounts are available to firms that are members of the National Association of Tax Professionals (NATP) and the National Association of Enrolled Agents (NAEA). GNS does not charge setup fees, and there are no contracts required.

www.GetNetSet.com

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/12096002

Tenez AFSB - Accounting and Financial Site Builder

BEST FIT

Tenez Accounting and Financial Site Builder (AFSB) is a good fit for small to mid-sized firms that desire a customizable website that can be created in minutes and updated as needed.

PRODUCT STRENGTHS

- Product contains easy-to-use templates and a setup wizard that assists new users with website creation

- Affordably priced for even the smallest accounting firms
- Integrated payment options included in pricing
- AFSB users receive a discount on all Tenez products

POTENTIAL LIMITATIONS

- Product does not include blog capability, although users can link to a blog created using another application

SUMMARY & PRICING

A good fit for small to mid-sized firms, AFSB's monthly subscription service is available for \$299.00 per year (paid annually), or users can opt to pay a fee of \$31.99 per month. There are no setup

fees or contracts involved, and new users are given a free 60-day trial.

In addition to the regular features offered by AFSB, additional services such as search engine optimization, custom web design, and newsletter distribution to more than 250 clients are available at an additional cost.

www.AFSB.net

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/12095997



Thomson Reuters Web Builder CS

BEST FIT

Firms that currently or plan to use CS Professional's Suite of applications in their practice.

PRODUCT STRENGTHS

- Solid Integration with other Thomson Reuters products & services
- A good selection of optional features is available

- Users can update website quickly and easily
- Good selection and range of website designs available

POTENTIAL LIMITATIONS

- Pricing can escalate when users choose add-on services

SUMMARY & PRICING

Thomson Reuters Web Builder CS is an excellent choice for firms already using the CS Professional Suite of applications. Users can choose from several design choices, with standard templates free. For those wishing to upgrade, a custom designed website with animation is available for a one-time fee of \$2,500.00. The monthly hosting fee is \$70.00 a

month, and there are no setup fees or contracts required. New users also receive a thirty day free trial, with add-on features such as additional emails and storage capability priced separately.

cs.ThomsonReuters.com/web-builder

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/12096003



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René Lacerte is CEO and founder of Bill.com and the former CEO and co-founder of PayCycle. As a third-generation entrepreneur building solutions for accountants, he is uniquely qualified to bring insights from an entrepreneur's and accountant's perspective. He can be contacted at rene.lacerte@CPAPracticeAdvisor.com.

ACCOUNTING IN 2025:

Three Undeniable Trends and How They Will Affect Accounting Firms

Jet cars. Hover boards. Food replicators. On a daily basis, movies, TV and books give us grandiose ideas of what our future holds. Futurologists take the entertainment value a step forward and make a living predicting how our world will change in 25, 50 or 100 years.



the connection between electronic devices will multiply and strengthen because of this.

Internet-enabled devices beyond laptops, smartphones and tablets (think watches and other wearable technologies) will become the standard not the exception. Imagine your home telling you to change the air filter or reminding you to order more animal crackers.

How does pervasive connectivity translate for accounting firms?

For accounting firms, this connectivity will spur an even stronger ability to practice without borders. No more shoeboxes full of paper or driving to the client to review documents. Better yet, prospective clients won't be limited to a particular geographic area. Firms will transition from consolidated hubs to divergent models spread across more locations and with fewer employees in each location. Employees will be hired for their skills, regardless of where they reside. Video will be even more integral with this remote workforce as a means to meet and collaborate.

Omnipresent Mobility

Omnipresent mobility isn't about having a smartphone or tablet. It is the ubiquitous expectation that you can do whatever you need to do no matter where you are. This still-developing trend – which is intertwined with pervasive connectivity – relies on hardware such as smartphones, tablets and watches.

Yet, the real power behind it comes from cloud-based technologies and applications and the ability to access and sync with software and documents as needed.

If you think Americans have unhealthy relationships with smartphones now, be prepared for 2025. The functionality of smartphones will vastly increase due to more interconnectivity between apps and numerous devices at home and work. The functionality encompassed in the smartphone will practically be glued to everyone's hands (or wrists or eyes).

Mobile payments – the last barrier to true mobility – will have entered into widespread acceptance by consumers in 2025. Consumers will

finally ditch the plastic and reach for their smartphones instead.

How does omnipresent mobility translate for accounting firms?

Practitioners will rely less on PCs and laptops and more on tablets or large smartphones. This technology will be productive as standards for Wi-Fi-enabled vehicles and mass transit evolve.

Spurred by the need for increased mobility, the cloud will hit the mainstream for accounting firms and their clients by 2025. It's a technology that perfectly suits the expectations of mobility, including increased collaboration and always-available access.

evolved by 2025, and mandates surrounding security and compliance will become stricter. This includes the type of information that is considered protected. There will also be swifter and more severe penalties levied against practitioners who store or transmit this information via unencrypted or unsecured manners.

How does a more paramount security focus translate for accounting firms?

This push toward increased security will guide accounting firms to scrutinize their practice and secure the data they hold on behalf of their clients. Awareness and

THE GROWING INFLUENCES OF CONNECTIVITY, MOBILITY AND SECURITY PRESENT A UNIQUE CHALLENGE FOR TODAY'S PRACTITIONERS.

Most importantly, business-to-business electronic and mobile payments will reach the mainstream as well. Clients will balk at check payments and demand the ability to pay more efficiently at any time and from any device – regardless of their location or the time of day.

Paramount Focus on Security

Target. Home Depot. JPMorgan Chase. Major data breaches in these organizations have elevated consumer awareness and concern for the security of private or personal information. Consumers, fed up with these breaches, are turning to the government to enact standards around the security of their personal information.

Daily processes and habits that are the norm today will soon open practices to sizable risks. For example, 25 percent of practitioners continue to deliver tax returns to their clients via unencrypted email (*Source: 2015 Accounting Firm Operations and Technology Survey*). This practice clearly exposes firms to unnecessary risk and the potential for costly fines.

Government oversight will have

technology will play critical roles in this effort. "Liabilities" such as paper-based processes and unlocked filing cabinets that expose protected information will be re-examined. Most will be migrated to electronic processes, in the form of cloud-based technologies including document management, workflow and bill payment. The cloud will become an especially important tool with regard to security since updates are automated and security measures that are required are already put in place. Proxy practitioners will be able to be in compliance with regulations without having to build their own technology fail-safes.

Conclusion

The growing influences of connectivity, mobility and security present a unique challenge for today's practitioners. If you ignore them, your practice could suffer. However, if you meet them head-on, you will have a healthy business tomorrow – and beyond. Take the time to review your current processes and technology to ensure you are set to meet and address these undeniable trends. ●

The most accurate predictions are rooted in trends happening right now. Rather than extrapolate on what the future holds for accounting firms in 3015 (for example), I see a clear benefit in focusing on the near-future – 10 years from now in this case – to spot meaningful trends that firms can embrace for long-term success.

Following are three undeniable trends that will hold considerable sway not only on consumers but also on accounting practices in 2025.

Pervasive Connectivity

With broadband access and expanded cell phone and Wi-Fi networks, we are nearing the point of seamless, continual and ubiquitous connectivity. By 2025, we'll have achieved it. It will be a wireless world, without the rat-tails of coiling cables. Technology such as nationwide or city-focused networks and/or Wi-Fi will trump dead zones, and



Starting a business sounds simple – take your idea, get a federal ID number and a bank account, and you’re ready to go. Unfortunately, that level of simplicity is a myth. There are many complexities and nuances when creating a business at the federal, state, and local levels.

Each state has its own set of rules and regulations and no two are alike. Non-compliance can saddle a new business owner with fees and penalties that could have been avoided with knowledge of the requirements. In this article, we offer insight on the varying regulations throughout New Jersey, New York, New York City, Pennsylvania, and Philadelphia with a focus on the limited liability company (LLC) structure.

The first things a prospective business owner needs to do is apply for a federal identification number using form SS-4, file Articles of Organization with the Department of State and comply with any required employment tax return filings. If you’re going to create a multi-member LLC, having an Operating Agreement drawn up is also strongly recommended. This internal document lays out the rights, duties, liabilities and obligations between the members and the LLC – a very important item to have.

New Jersey

All limited liability companies formed in New Jersey, or filing to do business in New Jersey, must first determine if the business name is available and then file formation documents to register and receive a Certificate of Formation. To register for tax and employer purposes a NJ-REG must be completed and, to ensure the continued use of your business name, an annual report filing must be completed for a small fee.

Income taxes will be reported on your individual tax return whether you are a single or multi-member

LLC, but there is an additional filing of Form 1065 if you are a multi-member LLC. If you employ at least one person, you will need to review the rules for employer and workers’ comp insurance. Depending on where your business is located and what type of industry you are in, there could be additional local permits, business licenses, certificates, registrations and/or sales and use tax filings to comply with. Be sure to check with your own state government to get the specific rules for starting a business in your state.

New York

To form an LLC in New York you need to be a New York resident and/or have a business entity in New York State and file Articles of Organization with the Department of State. New York LLCs are also required to update their contact information every two years by filing a Biennial Statement with the New York Department of State.

Income tax treatment is similar to that of New Jersey, being reported on your personal tax return with an additional filing of Form IT-204 if you are a multi-member LLC. If you have employees, the business will need to register with the New York Department of Labor and be mindful of any filings and/or payments for withholding taxes and wage reporting as well as unemployment, workers’ compensation, disability and health insurance.

Depending on the type of business, you may be required to register as a New York State Sales Tax Vendor, apply to the New York Department

of Taxation and Finance for a sales tax Certificate of Authority, and comply with any required sales tax filings. New York has a voluminous list of business types that are required to apply for additional licenses and/or permits, which all new business owners should review.

New York City business owners beware – the city may have separate registrations for these items! Additionally, if you conduct business in NYC you may be subject to the New York City Unincorporated Business Tax which is filed on Form NYC-202 along with your personal tax return.

Pennsylvania

An LLC operating in the state of Pennsylvania must file Form 8913 – Organization Domestic Limited Liability Company and Docketing Statement with the state. LLCs must register under a business name that is not already in use, and determine whether or not the name of the business is considered a fictitious name.

A fictitious name can be registered by completing Form 311 – Application for Registration of Fictitious Name; the name is required to be advertised in a newspaper of general circulation in the county in

partnership is required to file a PA-20S/PA-65 Information Return, and provide each resident and non-resident member a PA Schedule RK-1 or NRK-1 to report income taxes on their individual tax returns. LLCs doing business in the state of Pennsylvania are also subject to a capital stock/foreign franchise tax.

Philadelphia

Businesses operating in Philadelphia must have a Commercial Activity License from the Department of Licenses and Inspections. In order to obtain the Commercial Activity License, a business must first obtain a City of Philadelphia Tax Account Number, which requires a Federal EIN and Pennsylvania State Sales & Use Tax Number, both of which are also prerequisites for obtaining a Commercial Activity License.

An LLC doing business in the City of Philadelphia is required to file a Business Income & Receipts Tax (BIRT) Return, which is computed based on the gross receipts and net income, and a Net Profit Tax Return. In addition to State and Federal payroll withholding, an employer who pays wages to residents of the city of Philadelphia, or

EACH STATE HAS ITS OWN SET OF RULES AND REGULATIONS AND NO TWO ARE ALIKE.

which the business will be located. A newly formed LLC is required to complete the Pennsylvania Enterprise Registration Form (PA-100) and file with the Pennsylvania Department of Revenue, which will allow the entity to establish employer withholding, unemployment compensation insurance, and sales and use tax accounts.

The state of Pennsylvania has a 6% sales tax rate, and there is an additional 2% local sales and use tax for purchases made in Philadelphia and a similar local tax of 1% for Allegheny County. Use tax liabilities are reported on the PA-1 Use Tax Return. An LLC reporting as a

a non-resident working in the city, must withhold and remit a City Wage Tax. Based on the location and industry in which the business operates, there are various state and local business licenses and permits which must also be obtained.

In conclusion, one should seek competent tax advice to stay in compliance with the laws that govern their business in the states in which they will operate. ●

Lauren Reo, CPA is Tax Manager and Ryan Pederson, CPA is Audit Senior at WeiserMazars LLC.

A Post-Busy Season HR Checklist for Accounting & Tax Firms

By Paul McDonald

As your firm emerges from yet another busy season, the last things you want to revisit and mull over are all the long hours and hard work you and your team put in to reach the finish line. But before you officially move on from this intense work period, there are still two important things to do:

1. Show your appreciation to your employees for a job well done.
2. Think about how you can do things better next year.

Address both items now and your firm will be better prepared to meet the challenges of the next busy season. You'll not only have an action plan, but also a motivated team to help you carry it out successfully. Following are some tips for tackling these two essential post-busy season to-dos.

Praise and more pay: a winning combination

A sincere thank-you is a meaningful way to acknowledge your team members for their good work. No doubt, you've already offered thanks and praise to your staff. Perhaps you even acknowledged some or all of your employees in a more high-profile way — for example, by trumpeting their success in a firm-wide meeting.

But how do your workers want to be recognized? Think financial compensation. According to 60 percent of CPAs surveyed for *The People Puzzle: Building and Retaining a Talented Accounting and Finance Team* from the American Institute of CPAs and Robert Half, a salary increase is the preferred way to be acknowledged. (A promotion was a distant second, at 25 percent.)

Raises for deserving employees can also have a lasting, positive impact on your firm's retention efforts. Chief financial officers and workers interviewed for a Robert Half survey agreed inadequate salary and benefits is the number-one reason good employees quit their jobs. In today's highly competitive hiring market, skilled professionals know they have options and are not likely to continue working for an employer that is not providing an appropriate level of compensation.

If pay increases for your team members are simply not in the cards due to budget constraints, consider the bonus track instead. Keep in mind that replacing a productive worker costs much more than a bonus acknowledging that person's contribution to the firm's success.

The gift of time — and fun

Paid time off or extra vacation days — and making it possible for staff to take that time when they want to — can also be powerful perks. The end of busy season is an especially good time to underscore to your employees that the firm takes their well-being seriously. Show them how much by instituting scheduling and telecommuting options they can take advantage of year-round



to better maintain work-life balance.

This gesture can have a positive impact on retention, too: In *The People Puzzle*, accounting and finance professionals cited “flexible work hours” as one of the top three non-monetary contributors to job satisfaction. (And for CPAs at small businesses, it was #1.)

Arranging a fun activity or outing, like going to a baseball game together or having a picnic, is another way to show your appreciation for the efforts your employees made during busy season. Your whole team can let off some steam and get to know each other better outside of the office. And you — The Boss — have the opportunity to interact with your staff in a relaxed atmosphere and celebrate their recent accomplishments, all while enhancing your team-building efforts.

These recognition efforts can give your workers reason to be proud of what they achieved during busy season. And as the stress of the past several months fades, they also will soon recall why they love their jobs — especially if you help them remember.

Ask for staff input on how to improve

Now, to the second item on your post-busy season to-do list: Think about how you can do things better next year. Not

sure where to start? Ask your employees. They will know firsthand what worked and what didn't these past several months and likely have valuable suggestions for improvement. There are a variety of options you can tap to obtain their feedback. One-on-one and group meetings represent an opportunity to hold in-depth discussions on issues and suggestions raised by staff members.

If you have the resources, consider conducting an employee survey. Many times, people feel more comfortable offering feedback, particularly if it's negative, via an anonymous survey. The results can provide you valuable insights into how your team members are feeling and ways you can improve your operations.

In every communications channel you use, make clear that you want to hear individuals' concerns and recommendations. What you learn can help you determine, for example, whether you had adequate resources in place this year, and if you should consider setting aside budget for interim support or other hiring next year.

Before you know it, Q1 2016 will be here. Cross off these two final to-dos for 2015 if you want to be fully prepared to meet the challenges of the next busy season. ●

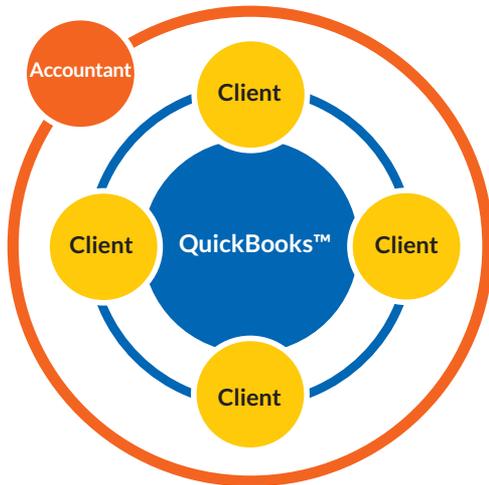
Paul McDonald is senior executive director with Robert Half, the world's first and largest specialized staffing firm. Over the course of his 30-year career with the company, he has spoken extensively on employment and management issues based on his work with thousands of companies and job seekers.



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- Sales Tax Functionality
- Payroll Functionality
- Audit Trail
- Multi-Currency
- Multiple Language Support
- Multi-Location Support
- Multiple Users

DAY-TO-DAY OPERATIONS

- Sales/Point of Sale/Shipping
- Customer/Vendor Employee Management
- Inventory/Purchasing
- e-Features
- Remote Access

MANAGEMENT FEATURES

- Dashboard Overviews
- Reporting
- Security Features
- Integration/Import/Export
- Data Transfer
- External Integration
- Online Accountant Transfer Tool

HELP/SUPPORT

- Built-in Support Features
- System Updates
- Support Website/Documentation
- U.S.-Based Support



Mary Girsch-Bock

Mary Girsch-Bock began her career as an accountant in the property management and healthcare industries. She is now a freelance writer specializing in business and

technology issues and is the author of her first book, several HR handbooks, training manuals, and other in-house publications. She can be reached at mary.girschbock@cpapracticeadvisor.com.

Document Management And Document Storage Systems for Accounting Firms

By Mary Girsch-Bock

In the Management of an Accounting Practice (MAP) Survey completed by the AICPA Private Companies Practice Section and the Texas Society of CPAs in 2014, it's clear that larger firms (with more than \$5 million in annual revenue) have embraced document management, with only 17% of those surveyed stating they do not use document management software.

That percentage rises considerably as annual revenues drop. The survey indicates that 33% of firms with annual revenues between \$7.5K and \$1.5 million dollars do not use document management software. The smallest firms – (revenues of less than \$200K annually) showed that 68% surveyed did not use document management software. While size alone may play a role – larger firms have significantly more documents to manage – accounting firms of all sizes can certainly reap the benefits of good document management or document storage software, which include:

- **Quick and easy document retrieval.** No one wants to search for documents in multiple file cabinets. Authorized employees can easily locate and retrieve electronic documents with little fuss and no frustration.
- **Secure accessibility.** Yes, you lock your file cabinets. Sometimes. But those cabinets have keys. And more than likely, those keys are in a central location somewhere in your office. By encrypting documents and assigning security levels to stored documents, you can be sure that those accessing confidential documents are those authorized to access those documents.
- **Better management of multiple versions of a document.** With document management software, you'll always know that the version you're working on is the most recent version, eliminating confusion and duplicate work.

- **Document routing capability.**

Instead of a pile of papers on your desk, or an overflowing inbox, imagine being able to route documents to select individuals for comment or approval without wasting paper.

- **Document security.** Catastrophic events such as a fire, a flood, or other natural disaster can also be a disaster for your firm. While no one is ever really prepared for such an event, having your vital documents secure is one major thing that you won't have to worry about.

- **Employee efficiency.** Everyone's busy, and as a result, everyone is looking for ways to save time without cutting corners or lowering quality of service. Would you rather have your employees spend more time working with clients, or standing at the copier making copies or searching for another lost file?

In this issue, both Document Management Solutions and Document Storage Solutions are reviewed. While both provide storage and retrieval functionality, document storage solutions generally contain fewer high-level features and functionality, with less indexing and storing functionality.

The Document Storage products reviewed in this issue are:

- Cloud Cabinet by AccountantsWorld
- Drake Document Manager by Drake Software
- FileCabinet CS by Thomson Reuters
- Practice Management Workspace by Office Tools
- SmartVault Document Storage by SmartVault

On the other hand, Document Management Systems allow for the capture, storage, and retrieval of documents; with most offering more flexible integration options, as well as a more complex document filing system.

The Document Management Solutions reviewed include the following

products:

- Cabinet SAFE CLOUD by Cabinet
- CCH Axxess Document/ProSystem fx Document by Wolters Kluwer
- Doc-It Suite by Doc-It Software
- eFileCabinet by eFileCabinet
- iChannel by Conarc
- GoFileRoom by Thomson Reuters

Many of these products are part of a more encompassing suite of products that many accounting firms currently use, thus providing excellent integration options, though most would work adequately as a stand-alone product, with some exceptions, which are noted in the review.

Whether your firm is in the market for a document management system or a document storage system depends on a number of things, including workflow levels, current tax software utilized, and even future needs. Cost may play a role as well, although there are affordable products for both document management and document storage. For those using CCH or Thomson Reuters products, a fully integrated document management feature is available that fully integrates with the vendor's other applications. While this is convenient, for firms that are not using these products, it's probably best to look at some of the other products available as well.

Once the decision is made to purchase, firms should consider using the vendor's support staff for product setup, as initial setup plays a large role in how easy (or difficult) it is to locate and retrieve stored documents.

Most of the vendors have additional information on their websites for potential users to take a look at with some vendors offering free demos that users can try out for a set period of time. So if you're ready for your firm to lose paper documents for the last time, be sure and take a look at these tools for keeping your office clutter free, and your documents secure. ●

DOCUMENT MANAGEMENT SYSTEMS

Cabinet SAFE CLOUD

BEST FIT

Firms that need a robust document management product that is easily navigated and integrates with a host of third party applications.

PRODUCT STRENGTHS

- Product is easily navigated, with documents able to be accessed quickly
- Product integrates out of the box with

both Microsoft Office and QuickBooks

- Tools are available that offer integration with a long list of third party applications
- Workflow capability is included in the product

POTENTIAL LIMITATIONS

- Upload and download speed requirements may require firms to upgrade internet capabilities

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/12096027

SUMMARY & PRICING

For those interested in offering Cabinet SAFE CLOUD to clients, the company offers a VAR (Value Added Reseller) program that allows accountants the opportunity to sell, install, and support the product as part of a consulting business.

Cabinet SAFE CLOUD is available at a cost of \$50.00 per month, with a one-time

setup charge that is negotiated during setup. Users can also receive a quote directly from the vendor for on-premise product installation. All users have both telephone and email access to company support, and all users receive automatic software updates to the product at no cost.

www.CabinetPaperless.com

CCH Access Document & ProSystem fx Document

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/12096028

BEST FIT

CCH Access Document and ProSystem fx Document are ideally suited to firms already using either CCH Access applications, or the ProSystem fx Suite of applications.

PRODUCT STRENGTHS

- Excellent integration with other CCH Access and ProSystem fx applications

- Integrates with Microsoft Office applications
- Product offers full text search capability

POTENTIAL LIMITATIONS

Product may not provide as much functionality without the use of related Wolters Kluwer Tax & Accounting products

SUMMARY & PRICING

While both products can be used as a stand-alone product, CCH Access Document offers better integration capabilities and may be better suited for firms not currently using other Wolters Kluwer Tax & Accounting products. Base pricing for CCH ProSystem fx Document starts at \$2,780.

Pricing for CCH Access Document is based on the number of users and can be obtained directly from Wolters Kluwer Tax & Accounting upon request.

www.CCHGroup.com

Conarc iChannel

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/12096023

BEST FIT

iChannel is a good fit for larger firms (25+) that are looking for a robust product that provides document management, CRM, and project management capabilities.

PRODUCT STRENGTHS

- Web-based application makes it easy to access documents remotely

- Product is multi-faceted; offering document management, CRM, workflow capability, client portals and email management bundled into one system
- The product offers three deployment methods – on-premises, hosted, and a vendor-managed server deployment
- Integrates with a large variety of third party applications

POTENTIAL LIMITATIONS

- Product is not particularly well-suited to small firms with less complex needs

SUMMARY & PRICING

All of the iChannel applications (Document Management, CRM, Email Management, and Client Portal) are bundled for a single price of \$549 per user - for up to 30 users.

Discounts are available for firms with more than 25 users. Users are also assessed an annual product maintenance fee, and additional fees may be incurred as well.

www.Conarc.com

Doc.It Suite

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/12096016

BEST FIT

Small to mid-sized firms that desire a comprehensive document management solution.

PRODUCT STRENGTHS

- Doc.It offers a long-list of system modules and features in addition to solid

- document management capabilities
- The Archive function converts storage documents to PDF, and stores them until an assigned expiration date.
- Offers multiple cloud-versions of the product
- The product offers a full-featured PDF Editor

POTENTIAL LIMITATIONS

- The product is only offered as a bundle, so users must purchase the whole system, not individual modules

SUMMARY & PRICING

Doc.It is available at the very reasonable cost of \$35.00 per user per month, and includes

all of the features and functionality offered in the Doc.It Suite. A one-time licensing fee is also incurred when purchasing the product and other fees for product implementation and training may be assessed as well.

www.Doc-It.com

eFileCabinet

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/12096018

BEST FIT

eFileCabinet is a good fit for small to mid-sized accounting firms that are looking for a cost-effective product that easily stores and manages documents.

PRODUCT STRENGTHS

- The product is available in both a desktop/on-premise version along with an online version.
- eFileCabinet easily integrates with QuickBooks products.

- A free mobile app allows the product to be accessed using iOS and Android devices.
- The product has an easy-to-navigate user interface that will require little training time.

POTENTIAL LIMITATIONS

- eFileCabinet does not currently integrate with any tax or audit software at this time.

SUMMARY & PRICING

With an easy-to-use interface, and a solid selection of features and top-level functionality, eFileCabinet is a good solution for small to mid-sized accounting firms. eFileCabinet also offers a number of add-ons including additional product storage, data conversion packages, and an SQL version of the product, which can work for larger firms.

Three levels of eFileCabinet are currently

- available:
 - Performance – which runs \$30.00 monthly and includes 100 GB of storage
 - Professional – which runs \$45.00 monthly and includes 500 GB of storage
 - Enterprise – which runs \$55.00 monthly and includes 750 GB of storage
- Implementation fees start at \$500.00 and go up to \$4,000.00 for up to 15 system users.

www.eFileCabinet.com

DOCUMENT MANAGEMENT REVIEWS

GoFileRoom

BEST FIT

Larger firms that currently utilize or plan to utilize other Thomson Reuters products including CS Professional Suite of products.

PRODUCT STRENGTHS

- Product offers a easy-to-navigate user interface
- Product offers flexible cloud access

- Add-ins are available for Microsoft Office applications, including Office 2013
- Add-on modules increase product functionality

POTENTIAL LIMITATIONS

- Product will only support Internet Explorer browser

- Product does not offer an on-premise version

SUMMARY & PRICING

GoFileRoom was originally designed for use with GoSystem Tax RS, and now integrates with several CS Professional Suite applications as well as NetClient CS. Training is recommended to get users setup

properly and up to speed on the product. GoFileRoom is available as a monthly subscription, with cost depending on the number of users. Add-on modules and training are extra.

www.GoFileRoom.com

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/12096021

DOCUMENT STORAGE REVIEWS

AccountantsWorld Cloud Cabinet

BEST FIT

Cloud Cabinet is an excellent fit for firms that currently use AccountantsWorld Power Practice suite of products, or firms that offer bookkeeping or payroll services to clients.

PRODUCT STRENGTHS

- Cloud-based, users can access the system from any location

- The product offers unlimited secure client portals at no additional cost
- Offers excellent integration with Power Practice suite of products, including automatic saving of documents created in Power Practice
- Products contains several tools designed specifically for P.C. users

POTENTIAL LIMITATIONS

- Product does not contain optical character recognition (OCR) capabilities

SUMMARY & PRICING

An excellent solution for those using or planning to use AccountantsWorld Power Practice products, as well as firms offering bookkeeping services, Cloud Cabinet

pricing starts at \$59.00 per user per month, or firms can choose to purchase the unlimited user package for \$595.00 per month.

www.AccountantsWorld.com

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/12096022

Drake Software - Drake Document Manager

BEST FIT

Accounting firms that use or plan to use Drake Software's all-inclusive suite of applications.

PRODUCT STRENGTHS

- Product offers seamless integration with other Drake Software products
- An easy-to-navigate user interface means less training time necessary
- An excellent solution for those already using other Drake applications

- Product is embedded into the tax software package, so storing documents is easy

POTENTIAL LIMITATIONS

- Product search capability is limited to name only searches
- Those utilizing other tax products will have no need for the product

SUMMARY & PRICING

Drake Document Management offers excellent training options for new users including

the e-Training Center, which provides training for the entire firm on Drake Software products. Tutorials are also available, and an evaluation guide as well as a user's manual provides excellent reference options.

For firms that currently use Drake Software products, Drake Document Manager offers a good document storage solution. Not available as a stand-alone product, the Drake Software bundle includes a tax preparation package, Drake Tax Planner, Client Write-Up, Client Status Manager, Drake Document

Manager, and Bank Manager modules. Added features include free online training, technical support, service bureau setup, and a network version of the product. The unlimited version starts at \$1,195, with a tax preparer website an additional \$1,000.00. Those who process limited tax returns can purchase the Pay-per-return package, which runs \$300.00 and includes 15 tax returns. Each additional tax return is \$20.00.

www.DrakeSoftware.com

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/12096020

Office Tools - Practice Management Workspace

BEST FIT

Practice Management Workspace is well suited to small to mid-sized accounting firms that are in need of a complete practice management solution.

PRODUCT STRENGTHS

- The product offers an all-in-one solution including practice management, document management, client portals, and CRM capabilities

- In-house instant messaging capability makes it easy to stay in touch with employees and partners alike
- Product offers good integration capability with Microsoft Office as well as other applications

POTENTIAL LIMITATIONS

- Is not well-suited to those looking for only a document management/storage solution

SUMMARY & PRICING

Practice Management Workspace is a good fit for small firms that are looking to implement and all-inclusive practice management/document management solution. Full integration with the core applications makes document management automatic, and synchronization with Microsoft Outlook provides excellent email integration and management as well. Practice Management

Workspace is priced starting at \$600.00 for a single user, with the product running \$1,600.00 for a five-user version. The client portal and other applications are priced separately.

www.OfficeTools.com

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/12096025

DOCUMENT STORAGE REVIEWS

SmartVault

BEST FIT

Firms of all sizes would benefit from this fully integrated document management and client portal product that works seamlessly with QuickBooks, Lacerte Tax, ProSeries Tax and other applications.

PRODUCT STRENGTHS

- Offers excellent integration capabilities with popular accounting applications

Offers both document management and client portal functionality

- Offers a mobile app for users to access documents from iOS or Android devices
- Customizable email templates and built-in mail merge functions
- SmartVault PDF Printer lets you print to PDF and save to SmartVault from any application

Read the full review and see expanded ratings for this product online at:
www.CPAPracticeAdvisor.com/12096017

POTENTIAL LIMITATIONS

- Users must use a OCR scanner to use full text search

SUMMARY & PRICING

SmartVault is an excellent solution for those looking for a product that will integrate with their accounting system. Available exclusively online, SmartVault starts at \$29.00 for the Basic version, with the Professional

version running \$99.00 per month and includes 10 employee users, 1000 GB of storage, and unlimited guest users, as well as full text search capability. Lacerte and ProSeries plans start at \$15.00 per user per month, and offer integration with popular accounting products such as QuickBooks, QuickBooks Online, Xero, and FreshBooks.

www.SmartVault.com

Thomson Reuters FileCabinet CS

BEST FIT

FileCabinet CS is a good fit for accounting professionals currently using the Thomson Reuters CS Professional Suite of applications.

PRODUCT STRENGTHS

- Solid integration capability with Thomson Reuters CS Professional Suite of applications

- Two versions available – one for smaller firms, and one for firms with more than 15 users
- Good integration with Microsoft Office applications

POTENTIAL LIMITATIONS

- FileCabinet CS Offers limited integration with other third party software applications

Read the full review and see expanded ratings for this product online at:
www.CPAPracticeAdvisor.com/12096024

SUMMARY & PRICING

Those using Thomson Reuters CS Professional Suite of applications will reap the most rewards with FileCabinet CS. The product can be deployed three different ways: On-Premise – which is the traditional licensing model, Virtual Office CS—where the software is purchased and then hosted by Thomson Reuters, or Software as a Service (SaaS) – where the product is leased

and hosted by Thomson Reuters. Pricing for FileCabinet CS starts at \$940.00, with maintenance and support costs charged separately. Both volume licensing and bundling discounts are available.

cs.ThomsonReuters.com

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7 Tips for Promoting Your Sales Tax Practice

By Gail Perry, CPA, Editor-In-Chief

By their nature, accountants often eschew promoting themselves and their services. For years we were told it was ethically improper to promote ourselves, but in the present day, it's very common for accountants to take the lead in self-promotion. If you want new business, it's imperative that you find ways to get your name in front of potential clients so that you can compete in today's market.

First, consider how you locate someone to perform a service. Your first step is to determine what type of work you want done, figure out the key words that you should search for, and then head to the computer or mobile device and search for those key words. You might need someone nearby, so you'll include your city in your search criteria, but if you're looking for a service that doesn't require an in-person connection, you could be search the entire country or even beyond our borders for the person with the specific skills you need.

Now flip that scenario because you are the person you want potential clients to find in their search. Here are some techniques you can employ to make sure you show up in the search results.

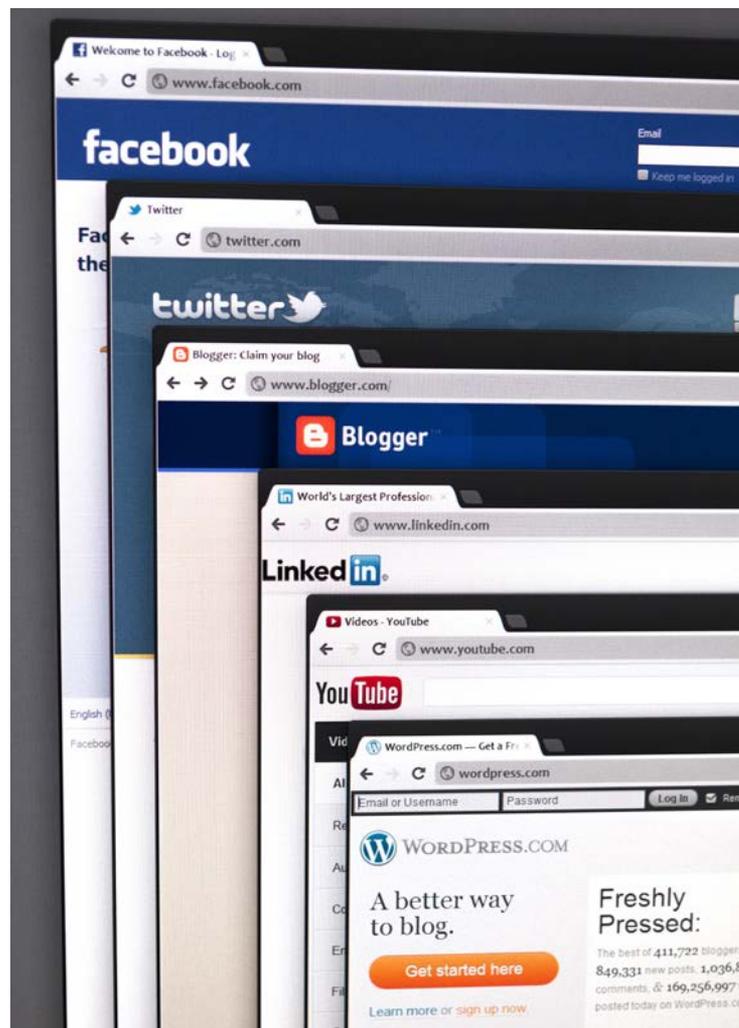
- **Think of the key words that best**

describe the services you offer. This might include words and phrases like Sales tax, Nexus, Out-of-State tax, Taxation of online sales, E-commerce taxation, Use tax, Multistate tax, State and local tax, and so on.

- **Using a key word search tool** (see sidebar), enter the key words you thought of and see what other key words people search for when looking for your words. This will give you a great idea of all of the terms that people use when they want to find a state and local tax professional.
- **Fill your website with the key words and phrases that you discovered in the above step.** The more you use these words and phrases on your website, including in page titles and metatags, the more likely you will come up in search queries.
- **Populate your site with links and have other sites link to you.** Inbound

SITES THAT PROVIDE KEYWORD SEARCH ASSISTANCE

- **Internet Marketing Ninjas:** www.internetmarketingninjas.com
- **Majestic:** <https://majestic.com>
- **SEOBook:** www.seobook.com/keyword-tools/seobook/
- **WordTracker:** www.wordtracker.com
- **Keyword Discovery:** www.keyworddiscovery.com/search.html
- **Ubersuggest:** www.ubersuggest.org
- **SEMRush:** www.semrush.com



and outbound links improve your search ranking.

- **Drive people to your site using social media tools.** Posting interesting information on Twitter, Facebook, and LinkedIn as well as sites like Reddit, Pinterest, Google+, and others will attract the attention of people who use these sites. For example, if you're looking for clients who have Etsy shops, start populating the Internet with links to a page of tips you have created for Etsy shop owners.
- **Make sure the information on your website is current** and that you make

it easy for customers to contact you.

- As you generate clients and business from your Internet activity, **ask new clients for brief testimonials** that you can post on your website. Seeing that others have discovered you and are satisfied will provide more reasons for future customers to request your services.

Once you start using Internet tools to expand your client base, you'll see what works best for you and can focus your attention on those areas. ●

3 Ways to Win New State and Local Tax Clients

By Gail Cole

Large corporations with armies of attorneys and accountants excel at taking advantage of tax credits and finding cost saving elements within a specific industry. Yet smaller companies tend to self-censor, assuming they don't qualify. The good news is that there are millions of small and mid-sized businesses in the United States alone, compared with thousands of large businesses. The people behind small and mid-sized businesses are everywhere: they eat lunch at your favorite restaurants; they jog down your favorite trails; and they'll be at the next party you'll attend. You may even find yourself sitting next to one during your next flight. And they are just waiting for you to tell them something they don't already know.

Three areas are ripe for the reaping of new clients:

- R&D Tax Credit – size doesn't matter
- Construction – cost segregation
- Sales and use tax – automate!

R&D Tax Credit

Many business owners think they're too small to claim R&D tax credits, but when it comes to tax incentives, size shouldn't matter.

Only a fraction of small and mid-sized companies eligible for the Research and Development tax credit take advantage of it; many don't even try because they erroneously assume they don't qualify. Show them how they can take advantage of it and they'll want you as part of their team.

For example, do they know that the R&D credit is open to the apparel industry as well as aerospace? That both software developers and dairy farmers could qualify? Do they know the following?

- In June 2014, the IRS made it easier for small and mid-sized businesses to claim the R&D credit. See instructions for Form 6765, Credit for Increasing Research Activities.
- Lab rats don't own the R&D tax credit. People in street clothes (like architects and engineers) are eligible, too.
- Improving outdated products and processes, which small businesses do regularly, can be enough to qualify.
- Eligible businesses can claim unclaimed credits for past open tax years (3 years).
- The credit carries forward up to 20 years, making it ideal for start-ups.

In addition to the federal R&D tax credit, research and development tax credits are available in approximately 40 states. State codes generally conform to the federal definition of R&D expenses that may qualify for a tax credit, but some stray from them, and the incentives and credit offered vary by state. California, for example, modifies the federal definition of gross receipts for the R&D tax credit. And that's just a very small aspect of one state's policy.

Clients depend on your expertise to help them negotiate and take advantage of both federal and state tax credits.



Cost Segregation

Construction and real estate can be contentious, thorny industries. Sometimes, a high tolerance for pain and stress is required in order to achieve what's best for the organization. Take cost segregation—a voluntary technique to avoid underutilization of depreciation advantages that can greatly benefit taxpayers. Potential clients will undoubtedly understand the depreciation of fixed assets but the more advantageous depreciation provided by a Cost Segregation Study is best undertaken by someone with expertise. Claim depreciations without sufficient documentation to back them up and you could easily find yourself paying heavy back taxes, fines and penalties.

Timing and strategy matter. Different approaches are needed for different property types (apartments versus manufacturing facilities; retail stores versus warehouses), but any leasehold improvement could qualify for a Cost Segregation Study.

Potential clients will want to work with you if you:

- Can provide clients with expertise in construction and engineering as well as tax.
- Have an in-depth understanding of relevant legal precedent and changing

tax laws.

- Know how differing circumstances affect the depreciation of the exact same type of property.

Sales and Use Tax

There are more than 12,000 sales tax jurisdictions in this country and their rates are all subject to change. State and local jurisdictions regularly change rates, alter boundaries, amend regulations, and eliminate existing exemptions and create new ones. In addition, state sales tax holidays exempt small handfuls of products during specific periods of time; in some states local participation is mandatory, and in some states it isn't. Every time there is a change, businesses are impacted. And as with all things related to taxes, failure to comply can be costly.

As a CPA, you know this. But do you know about automated sales tax Software-as-a-Service?

Can you help future clients:

- Facilitate exemption certificate management?
- Apply accurate sales tax rates for all transactions?
- Handle mercurial product taxability rules and regulations?

With automated sales tax SaaS, you can, perhaps allowing you to devote more time to helping clients by securing R&D tax credits or producing a Cost Segregation Study. ●



Gail Cole is a sales tax expert with Avalara and has a penchant for digging through the depths of BOE sites and discovering and reporting rate changes across the country.



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A YEAR IN THE LIFE: PAYROLL ACCOUNTANT

How to Tell If a Small Business is Compliant with HR Law

By Christina Merhar

As a small business owner or advisor, you don't have a lot of time to spend on Human Resources. At the same time, you need to ensure that employees are taken care of and that you are compliant with various HR rules and regulations. Where to start? Here are eight basic questions to assess if your business is HR compliant.

1 Are Employee Files Up to Date?

In general, there are three separate types of employee files to create and maintain: an I-9 File, Personnel Files, and Medical Files. It's best to assume all this information is confidential, so keep these files in a secure location. Only people with a compelling business reason should have access to these files. For a list of what should be included in each file see: Small Business HR Basics (www.zanebenefits.com/blog/small-business-hr-basics).

2 Do You Have an Employee Handbook?

The employee handbook explains your company's policies and procedures, and communicates your expectations to employees. It also helps protect your business in the event of a dispute. For a list of employee handbook basics, see Small Business HR Basics (www.zanebenefits.com/blog/small-business-hr-basics).

3 Have You Posted the Required Notices?

There are various required state and federal workplace notices to post at your business. There are several online vendors who, for a minimal cost, will provide state and federal

required notices to post. You can also visit the Small Business Administration (www.sba.gov/content/workplace-posters) for more information.

4 Are You Paying at Least Minimum Wage?

The minimum wage is the minimum hourly wage an employer can pay an employee for work. The current federal minimum wage is \$7.25/hour, however many states, counties, and cities have established their own minimum wage laws. See this list of minimum wage by state (www.zanebenefits.com/blog/minimum-wage-rates-for-2015-by-state).

5 Are You Verifying Employment Status?

It is illegal to hire an individual who is illegally residing in the country. As such, each individual's identity and employment eligibility must be verified in order to be hired. This is done by completing an I-9 form that is provided by the United States Citizenship and Immigration Services (USCIS).

6 Are Your Interviews Lawful?

Hiring is an exciting part of your company. As such, be sure you understand what questions to ask -

and not to ask. For instance, did you know that you cannot ask questions that reveal a person's race, gender, religion, marital status, disabilities, ethnic background, country of origin, or age? Have your questions planned out to ensure you don't accidentally venture into one of the questions that are illegal to ask.

7 Are Your Health Benefits Compliant?

Most small and micro businesses cannot afford traditional health insurance. Instead, they reimburse employees for their personal health insurance policies. Whether you offer traditional health insurance or a reimbursement arrangement, there are important compliance changes with health reform. Make sure your health plan complies.

Read more: Compliance Rules for Premium Reimbursement Plans (www.zanebenefits.com/education/premium-reimbursement-arrangements-compliance)

8 Are You Up to Speed with Employees' Rights?

Even if your small business doesn't have union employees, all employees have certain rights under federal laws. Know what these rights are so that you don't violate them. They can be found on the Department of Labor website. (www.dol.gov/opa/aboutdol/lawsprog/htm)

These eight questions will get you started with assessing your HR compliance. What additional questions do you have about HR compliance? Check with your payroll advisor who can help you with your HR compliance questions. ●

A Year in the Life of a
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What's Next For Proposed Changes to Overtime Pay and Exempt Employees?

By James Paille, CPP

The Fair Labor Standards Act has been around since 1938. The purpose was to set federal minimum wage (then 25 cents an hour), regulate child labor and set exempt (white collar workers) and nonexempt rules for overtime pay (originally 60 hours). There were a few changes such as overtime pay now starts at over 40 hours but generally the rules for overtime for the most part stayed constant until 2004.

By definition an employee is considered nonexempt – subject to overtime (time and ½ over 40 hours of work in a workweek—by federal standards) unless the employee can fall into one of four categories of exemption. These categories are

Recently, the Department of Labor (DOL) has released proposed rules to update the exemptions from overtime.

If a person is to be considered exempt – they must meet all of the following tests:

THE DEPARTMENT OF LABOR IS ACCEPTING PUBLIC COMMENTS UNTIL SEPTEMBER 4, 2015.

executive, administrative, professional and high salaried. Two additional categories have additional specific conditions – they are outside sales and computer positions.

The salary test for exempt employees was \$250/week. In 2004 the department of labor revised the overtime regulations and made the exempt nonexempt distinction more modern. In addition to modernizing the definitions the DOL raised the salary test to \$455 per week. Additionally the high salary test was raised to \$100,000. Also certain professionals such as teachers do not have any salary test.

As of 2016 (date is estimated and subject to change and possible delay) white collar workers would need to fulfill a duties test. The duties test is different for each of 3 of the 4 classifications (executive, administrative, professional). This is consistent with the current rules. The DOL is also asking for comments on possible changes to the duties tests.

Second is the salary level test, which says a salary has to be a certain amount. Currently, that salary is set at \$455 a week or an annual salary of a little over \$23,000 a year. For the three classifications above

(executive, administrative, professional) these proposed regulations would raise that to \$970 a week, or a \$50,440 annual salary.

The high salary test would increase to \$122,148.

The Department of Labor is accepting public comments until September 4, 2015. The DOL is seeking comments on whether to allow nondiscretionary bonuses, such as certain production or performance bonuses, to satisfy a portion of the standard salary test requirement.

So what's next? After the comment period ends, the DOL will review all comments. Possible outcomes could be immediate implementation of the new regulations as proposed. More likely will be some revisions which could be implemented but more likely another comment period, another review and then implementation. Keep an eye on the next DOL notice sometime after September 4, 2015. ●

James Paille CPP is the Director of Operations for Thomson Reuters myPay Solutions. He has been an executive manager in the payroll service industry for more than 30 years, specializing in managing multi-location offices. Jim is President-Elect of the American Payroll Association as well as a member of the National Speakers Bureau, and chairs the CPP Certification Review Panel. He holds a Bachelor of Science in Accounting from St. John Fisher College in Rochester, NY.

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- Build and profit through payroll processing.
- Control client billing: easily add a custom markup to the wholesale cost, either by a percentage (%) or dollar (\$) amount.



Payroll Portal with Your Name & Brand

- Promote your firm's brand and scale your payroll business with SurePayroll. Clients access a fully branded online payroll portal complete with your business name, logo, and color scheme.



Backed by Expert Service

- Receive support from a highly experienced customer care team if you or your clients have questions regarding payroll or taxes.

Learn how you can easily manage payroll.

SUREPAYROLL
A Paychex® Company

Call 855-354-6941
or Visit www.EasySurePayroll.com/Payroll-Series

Are You a Bad Boss?

10 Signs That You Might Be

The managers who are vital to the success of a business aren't just bad. The majority are shockingly bad, and you might be one of them.

A Gallup survey from last year found that only one in ten bosses in America has any native talent for management, and only another two in ten could be good managers with a little training and support. That leaves the overwhelming majority of bosses having little or no management talent at all.

Follow-up surveys, including the Gallup 2015 survey of workers in America, found that people don't leave jobs – they leave their bosses. About half of the 7,200 adults surveyed said they have left a job in order “to get away from their manager.” Worse yet, it found that only about 30 percent are truly engaged in and committed to their jobs. These rest are ambivalent at best or disengaged at worst.



Dave McClure is a consultant and widely published writer on technology issues. He can be contacted at dave.mcclure@cpapracticeadvisor.com

Good managers are those who communicate with their employees, motivate people, overcome obstacles and make unbiased decisions for themselves and their team. The fact that so few good managers exist can be chalked up to three realities:

The traits that make a great entrepreneur can also make a bad boss. Entrepreneurs tend, according to a Forbes article, to be obstinate multitaskers who are generally not team players. They can be autocratic, perfectionist, temperamental and workaholic. Though successful, they may have traits that would score as mental illness on standard psych evaluations. Not all are this way, or to any great degree. But the traits are there.

Companies fail to choose the candidate with the right talent for the job 82% of the time. While many companies have talented managers right under their noses, Gallup found that few have the skills to identify and promote them. The secret to getting a management position is more often based on a person's ability to fit into the culture than any management abilities. That is, bad bosses hire or

promote other bad bosses.

Good managers don't stay in bad companies. Good managers leave bad work environments, but bad ones stay. Good managers want to work with the most talented employees, and where their own talents will be recognized.

The problem with bad bosses in companies of any size is a loss of productivity, which in turn leads to a loss of profitability. There is also the issue of losing the best and most talented

workers – those professionals best positioned to innovate and create.

Any company can be successful in the short term, driven by its founders and an innovative idea. Success in the long, term, however, requires a completely different skill set that guiding a startup through its first critical years. That is why so many founders are eventually relegated to a corner office so they do not interfere with continued growth.



If you do happen to be a bad boss, what are the traits that are sabotaging the company you exist within? **Here are 10 of the most common “bad bosses:”**



THE MICRO-MANAGER.

This is a boss who has to make every decision personally. Or, worse yet, reviews all decisions made by workers and reverses them or over-rules them long after the fact. Micro-managers may seem to be concerned and involved, but they are terrified they will be blamed if a member of the team makes a mistake – and therefore they have to be in total charge of every facet of every task.



THE KNOW-IT-ALL.

Bosses may know a lot about the core business of the firm. This is especially true in small CPA firms, where the managers may have awesome accounting, tax and audit skills. That does not, however, mean that they are well-organized, have great client management skills, or know how to manage such intricate specializations as human resources, marketing, new product assessment or client retention. Almost no partner or boss is truly a master of all facets of the business. They may just think they are.

THE “CAN-DO” BOSS.

This is the boss or partner who commits you and the firm to meet a new and tight deadline on a shoestring budget – in addition to all of the other work already being

done. This can stress the entire firm to the limit. An occasional “impossible” job done well, in which workers share in the glory and reward, is fine. But if this is a regular event, good workers will flee from the aggravation and lack of recognition.



THE PAPER-PUSHER.

A boss who has no management skills and knows it may instead demand that workers protect him or her by filing reports on every single facet of every task. In this way, if anything at all goes wrong the boss can show in excruciating detail that it was not their fault. This style of manager will have workers spending so much time writing and filing paper that they have little time to do anything productive. One major clue: the boss who requires that every action, decision and project be authorized in advance and in writing before work can be started.



THE WATCHER.

Technology is a wonderful thing, unless it is abused by the micro-managing bad boss. These are the bosses who install time clocks to log workers in and out, who install cameras in every office so that employees can be monitored every moment of the day, or those who use time sheets as a management tool rather than a billing tool.

THE BEST FRIEND.

Part of the morale-building in small firms revolves around group events – lunches, pizza parties, birthday celebrations and so on. But some bosses

aren’t interested in morale-building – they just want friends and can’t find them on their own. They become confidants and bar buddies, after-work dinner friends, and sharers of intimate personal insights. It’s like working for your life partner, but infinitely more dangerous to your career.



THE OFFICE GOSSIP.

Some bosses just love to gossip – especially about people who work for them. They choose favorites to be the recipients of this information, and confide in private to some employees about others. They pit one employee against another for their personal amusement, using gossip in the place of formal performance reviews and honest feedback. Bad bosses use gossip to maintain their own power, destroying anyone with the potential to displace them.

THE WORKAHOLIC.

The workaholic is on the job 24/7, and likes it that way. They have little need for or understanding of life/work balance. Worse yet, they insist that everyone who works for them also be a workaholic. They call staff meetings on Sunday mornings. They insist that workers be available at all hours after work in case they or a client needs something. They have the whole company work late on Christmas Eve, just in case a client might possibly still be working and need something. If the boss wants to be a workaholic, fine. You don’t need to be one as well.

THE LIAR.

Want to take a better position? The Liar will counter-offer to keep you, but fire

you a few months later for disloyalty. The Liar will promise promotions and raises for your excellent work, but will never deliver. Remember, every dollar into your pocket is a dollar less in his or hers. The first time a boss fails to deliver on a promise without a good explanation should be the last day you work for that firm.



THE SCREAMER.



There are people who simply derive pleasure in abusing other people, and many of them are in management positions. These are the ones who scream at their staff, belittle them, refuse to listen to their ideas, and who throw temper tantrums when things go wrong. No part of verbal or emotional abuse should be tolerated by a bad boss, but unfortunately many professionals believe that if they take the abuse they will eventually be rewarded. They won’t.

There are other types of bad bosses -- the office Romeo, the alcoholic or drug-affected boss, the emotional cripple, the Scrooge, and even the boss who lets his or her spouse run the company in the background. The problem with bad bosses is that they seldom recognize themselves.

Particularly in small firms, the bosses themselves may not undergo any performance evaluation each year. Good bosses will seek out feedback on how well they are doing and how they may improve as managers – through suggestion boxes or anonymous feedback forms.

Bad bosses do not. But there is nothing to stop staff members from making a copy of this article, highlighting the appropriate points, and leaving it on their boss’s desk. ●



Intuit Wants to Be Your Perfect Partner with New ProAdvisor Programs

A successful business is made up of multiple successful partnerships. Sometimes it's the partnership between owners; other times it's the partnership between the business and its vendors. But what makes a good partner? Financial software provider Intuit not only knows the answer to this, but it wants to *be* a good partner to the thousands of ProAdvisors worldwide.

"A good partner does three things: gives you good advice; introduces you to new friends in the form of mentors, clients and other business partners; and supports you. As we prepared to roll out the next version of our ProAdvisor certifications, we had to ask ourselves, 'What are we doing to support these three things and how can we continue to do it in the future?' Helping our ProAdvisors succeed all comes down to us being a good partner," said Luis Sanchez, Director of Intuit's QuickBooks ProAdvisor program.

Intuit believes the purpose of its role as a partner is to help accountants become trusted ProAdvisors. This will help them grow their practice by getting more clients, and also delivering better service to existing clients. For accountants to truly move into the trusted advisor role, they have to embrace current and future technology.

"Our CEO Brad Smith always says, 'Change can happen to you or through you. It's your choice.' We want change to happen *through* our ProAdvisors and us, not *to* us," said Sanchez.

Giving Good Advice

Intuit is committed to ensuring its ProAdvisors stay up-to-date with the latest training and certifications. As such, it has released three new QuickBooks ProAdvisor certifications and updated its Advanced

Certified ProAdvisor Online certification. The three new certifications are Certified ProAdvisor Enterprise, Certified ProAdvisor Point of Sale and Advanced Certified ProAdvisor Desktop. All four certifications were announced at Scaling New Heights.

In addition to the new and updated certifications, Intuit is also partnering with Ron Baker, founder of VeraSage Institute, to offer guidance to professionals on switching to a value pricing model. Much like cloud-based accounting, the future of the profession lies with value-based pricing. Many professionals have already stopped billing for time, but for those that haven't, Intuit is committed to providing guidance and resources.

Introducing New Friends

Intuit has built up its QuickBooks ecosystem over the years and is continuously launching partnerships with new apps that its customers can benefit from. Recent partnerships include Bill.com, TSheets and Receipt Bank. As part of its partnerships with TSheets and Receipt Bank, Intuit customers received lifetime accounts. Other benefits of the partnership with Receipt Bank include a 50 percent discount for multi-user clients and dedicated support, as well as access to training and certification

In addition to its partnerships and apps, Intuit is committed to helping its ProAdvisors find new clients. The

company built its "Find A ProAdvisor" directory into QuickBooks Small Business to connect small business owners with trusted ProAdvisors. An updated version will soon be released that will include more detailed information about each ProAdvisor, and make it easier for business owners and ProAdvisors to connect.

Supporting Partners

Intuit believes in listening to its customers and responding to feedback. The best way to do this is to ensure that they have the best customer service agents in place when customers reach out, which is why Intuit is committed to cross-training its support agents with accounting knowledge. In order for them to effectively solve customers' problems, agents must have an understanding of *why* an issue is a problem.

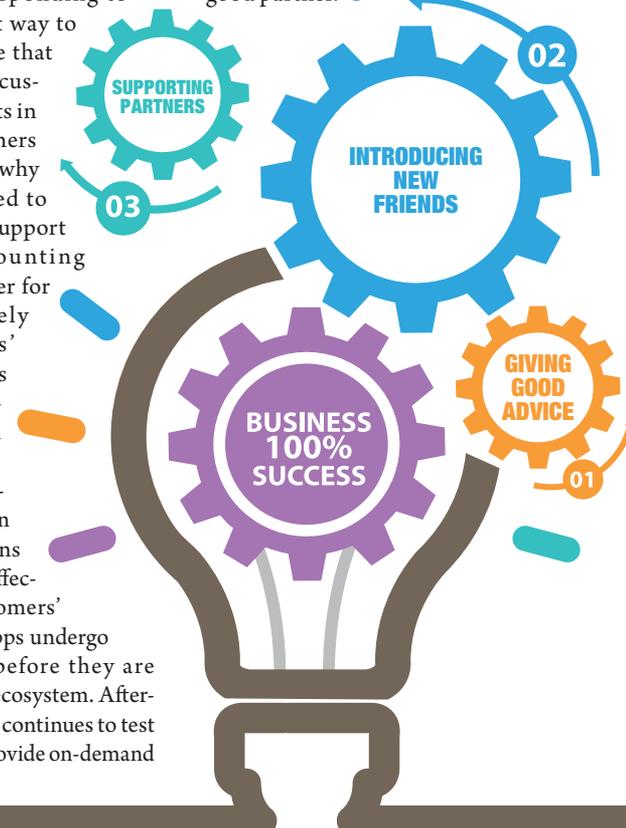
Intuit also performs regular tests on its apps and solutions to ensure they are effectively solving customers' pain points. New apps undergo vigorous testing before they are released to the QB ecosystem. Afterwards, the company continues to test the apps as well as provide on-demand

support for its solutions. This is especially important as Cloud solutions are regularly updated.

While Intuit fully supports the Cloud, it also continues to invest in its Desktop solutions.

"Our customers that continue to use our Desktop solutions, or have clients that do so, want to know that we are continuing to invest in them. And we will. We will continue to invest in them and make enhancements every year as long as they continue to use our products. 'No desktop is left behind' is our motto," said Sanchez.

With 130,000 ProAdvisors in the US, Canada, UK, Australia, India and France, and 1 million QuickBooks Online paid subscribers globally, it's safe to say Intuit knows a thing or two about growth, working in the Cloud and being a good partner.



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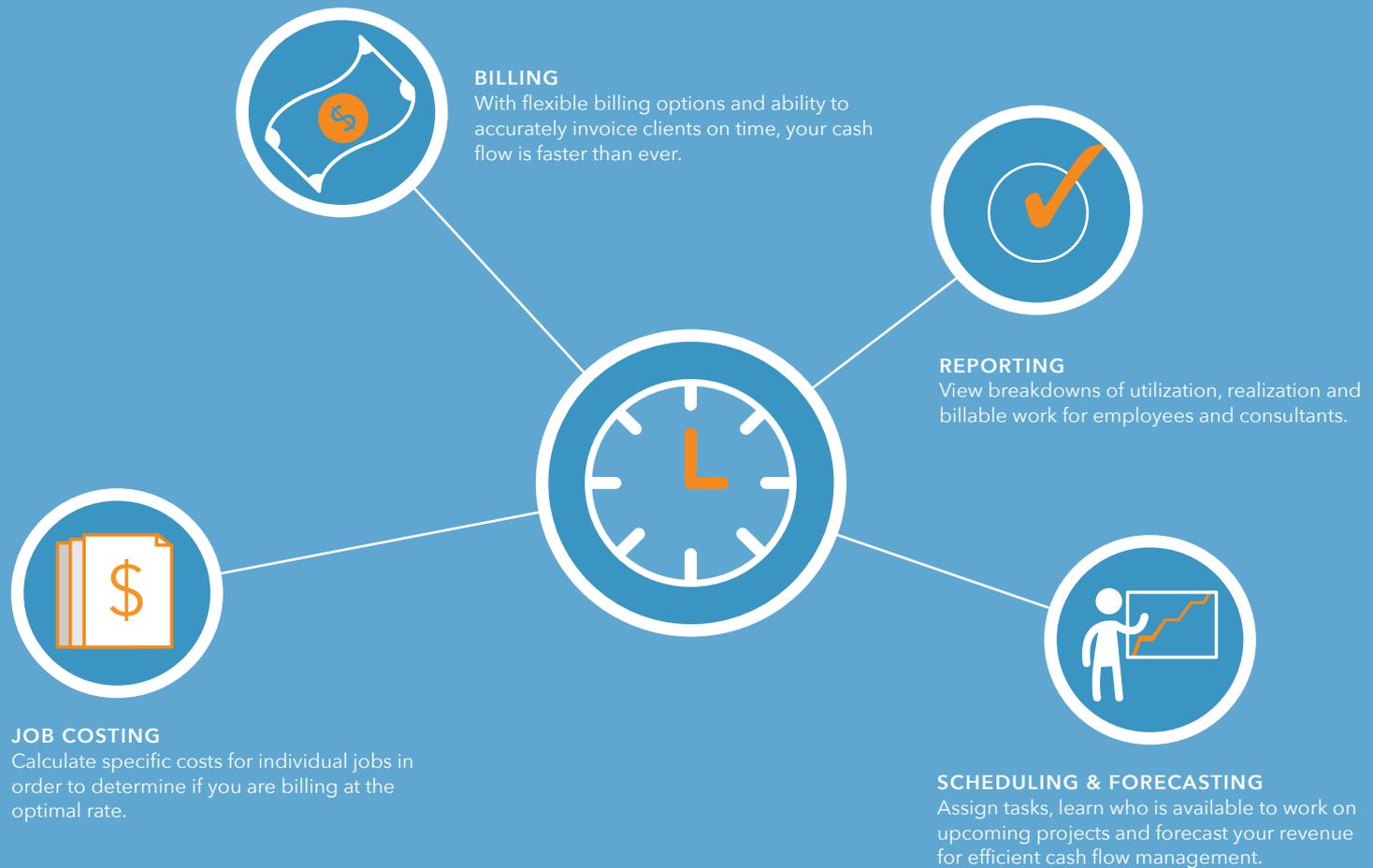


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