



## **CLIENT PROFILE**

GO, CPA is an accounting and tax-planning firm that services digital business owners, high net-worth individuals, and real estate investors.

## **THE PROBLEMS**

- Inefficient workflow that limited growth

## **THE SOLUTION**

TaxPlanIQ – The project management platform for tax planners.

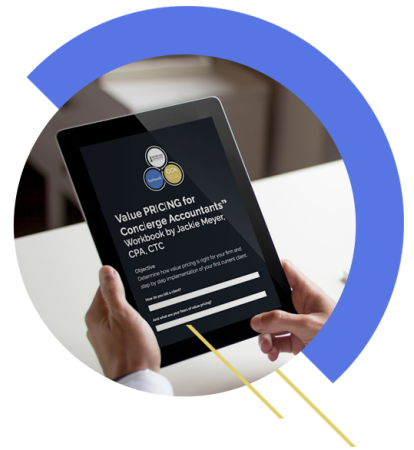
## **THE RESULTS**

- Easy for clients to understand
- Simple-to-create ROI calculations
- Helpful strategy database
- Ability to scale the business

“I’m loving using TaxPlanIQ. It’s a platform that solves some serious pain points.”

- Greg O’Brien, CPA

# GREG'S STORY



## Greg O'Brien, CPA Impresses Prospects and Clients with TaxPlanIQ

Focusing on digital business owners, high net-worth individuals, and real estate investors, Greg O'Brien, CPA is a firm that offers more than CPA services. Greg and his associates also counsel their clients in advanced tax reduction and planning. With a focus on providing a high-impact, forward-thinking, proactive strategy, Greg and his associates can reduce their client's tax obligations to the fullest extent allowable by law.

After leaving his corporate job in 2018, Greg started his CPA practice as a solo practitioner who sought out startup companies as clients. Later that same year, Greg attended training at the American Institute of Certified Tax Planners. "The training was really eye-opening and game-changing," admits Greg. "It introduced me to new possibilities for my firm."

### The Problem

Greg's firm quickly grew to a team of 10 employees. With a group of CPAs, accountants, and administrators, Greg provides a growing range of services to his clients, such as tax planning.

However, along with that growth came several challenges—most of which concerned the time-consuming manual work necessary to serve his clients. For instance, it took lots of time for Greg to provide upfront calculations to prospects. That's because he had to make those calculations in an Excel worksheet.

Also, Greg couldn't track the various strategic opportunities he had discovered for his clients. And he couldn't track the status of the work his firm was doing for its clients.

These challenges led Greg to look for a solution. That solution was TaxPlanIQ.



## The Solution

A cloud-based application, TaxPlanIQ is a tax firm planning tool that helps accountants with tax calculations, planning, and general organization. The platform decreases the time spent manually inputting data into spreadsheets by aggregating data into one location. TaxPlanIQ also creates workflow efficiencies that help CPAs provide higher-value tax planning services to their clients.

Using TaxPlanIQ, accountants can perform tasks that usually would take them hours to complete manually and turn that into a 15-minute job. With TaxPlanIQ, accountants not only decrease the amount of time working on a client's project, but they are also able to serve their clients better and increase the firm's revenue.

TaxPlanIQ offers features to accountants and certified tax planners that:

- Reduce time and potential mistakes
- Increase response time
- Quickly create ROI updates
- Simplify client interaction

## Easy for Clients to Understand

In the past, Greg often ran the risk of confusing his clients with complicated Excel spreadsheets. But now, with TaxPlanIQ, showing clients where they are saving money is easy.

"One of our newer clients clearly understood what we were presenting to him," shares Greg. "To him, it wasn't some form of accounting magic. TaxPlanIQ laid things out in plain English with complete sentences. As a result, they were able to see the savings that I found for them and the value they were going to get from working with me."

TaxPlanIQ also empowers CPAs to give clients various levels of detail. "Many times, CPAs give too many details to their clients and prospects," said Greg. "TaxPlanIQ simplifies things. It allows me to show three levels of detail. So, if a client wants to get into the weeds, we can show them more information. On the other hand, if a client only wants to see the high-level view, we can accommodate that."



## Easy-to-Create ROI Calculations

TaxPlanIQ allows CPAs to create ROI calculations easily. “I do a lot of pitches to prospects, and TaxPlanIQ really cuts down the time I spend on putting those pitches together,” Greg explains. “Before, it took a couple of hours to put together a proposal. Now, I can develop a proposal in just 30 minutes. The efficiency is outstanding.”

## Helpful Strategy Database

TaxPlanIQ contains a detailed database of tax-planning strategies. “TaxPlanIQ continues to add tax-planning strategies to the platform,” says Greg. “And they have a series of implementation guides and educational resources. All of those things have been very helpful to me. Because this information is all in one place, I don’t have to dig around in a million places looking for things. Everything is concise and straightforward.”

## Scaling the Firm’s Services

Greg and his firm have a promising future thanks to TaxPlanIQ. “I’m looking to get my entire team trained on TaxPlanIQ and the techniques I’m using on the tax-planning side,” shares Greg. “Ultimately, that will allow me to scale up the firm to serve more clients. And I believe that this platform will help me reach my goal of growing sustainably.”

**“I do a lot of pitches to prospects, and TaxPlanIQ really cuts down the time I spend on putting those pitches together ... The efficiency is outstanding!”**

