Taxfyle simplifies time spent preparing tax returns

Snortland, Fernandez, Brown & Gruver (SFBG) partnered with Taxfyle and reduced the amount of steps it took to complete tax returns for their clients while reducing operating expenses.

The study's background

The clients

Located in Roseville, Ca., SFBG was founded in 1946 and has provided their region with various accounting and tax services. The firm offers a range of accounting and tax services, and its seven employees handle work for 275 clients.

The problem

During tax season, SFBG struggled finding adequate staff and after one of their partners left, SFBG struggled to find a replacement, leaving two partners to fill the gaps. Their issues finding quality CPAs is a problem they faced for years, which added stress and bottlenecks to their existing workflows.

The challenge

With fewer graduates and employee attrition, the industry's staffing challenges hit SFBG hard. Taxfyle provided a unique solution to SFPG's staffing concerns, allowing the firm to handle tax season'd demands. Taxfyle enabled SFBG to connect with qualified CPAs and EAs within California, addressing the issue head-on.

The solution

Taxfyle and SFBG partnered together to develop a solution to their staffing needs. Taxfyle customized a workspace and assigned a CPA from its Pro network to handle the jobs SFBG submitted.

The results

The firm was able to optimize its existing workflow, creating an "efficient, cost-saving, stress relieving" experience. This helped reduce the time it took to complete tax returns and scale further.

"We have a very complex multi-step process preparing returns here. With having [Taxfyle] do it, it made mine and Rich's job more efficient because we could actually skip one of the steps."

Patricia Gruver, partner at SFBG