

Tolbert, CPA case study

Taxfyle's service generates increased client engagement

Taxfyle provided Tolbert, CPA with the ability to offload tax returns and focus on adding value to time spent with clients.

The study's background

The clients

Tolbert, CPA is a small firm located in San Antonio, Texas with full-time staff members, managing 70 clients. While tax services such as compliance and return preparation are part of what they offer clients, they specialize in working with businesses.

The problem

Client relationships are of the utmost priority for Tolbert. But they wanted to find more room to grow and address the complex needs from larger clients without increasing the risks of burnout amongst staff. Finding quality CPAs and EAs is difficult, and Tolbert was not immune to this issue.

The challenge

The tax industry is facing a staffing shortage. Young talent is not entering the industry like it had in the past, and industry veterans are leaving for other opportunities. Because they wanted client relationships to remain a priority in their services, Tolbert wanted a service that connects them to an accountant on-demand that's located within the U.S.

The solution

Tolbert turned to Taxfyle because it guaranteed their clients' tax returns would be worked on by a Tax Pro within the U.S. Taxfyle created a customized workspace and assigned a CPA and an EA to the firm.

The results

Partnering with Taxfyle allowed Tolbert to feel less constrained by tax season's rigors and provide high-value engagements with its clients. They managed jobs within their workspace, and experienced Tax Pros prepared their clients' tax returns.

"Anything I didn't have to pay attention to, I could give to [my Pros]. It was wonderful. I could focus on those things that make the relationship more valuable to the client."

Sherry Tolbert, owner of Tolbert, CPA