

Julie Lepper, CPA, and Her Team of Mom Accountants Are Tipping the CCH Axcess™ Charts

"I came out of school with a bachelor's in accountancy – it was back in the day where we were *the girls*, when I would have a new client come in who was a woman who was the breadwinner and I would put her name as the first taxpayer on the tax return – I got into very long discussions in my firm about why that was wrong," said Julie Lepper, reminiscing about tax prep in the 1980s.

The first accounting firm Lepper worked used CCH® ProSystem fx® Tax software. "I think it was the first year they were actually using software in-house instead of writing it all down and sending it in and them sending it back. The software format setup was like, 'Here's what we do to process the return manually, and then put it into software.' It was very tedious; our firm was not into technology."

"I always had it in the back of my mind to start my own practice. I had one child while I was still employed, and when I had my second child, I incorporated with the intention of probably starting my own firm in the next year or so."

Lepper began her own accounting practice by working out of her home. As she continued to take on more business, she needed to hire people, she found an opportunity for some office space, and the pieces fell into place. She was and remains dedicated to working with people who understand the importance of work/life integration. "Everyone who works for me and who has ever worked for me has either been a stay-at-home mom getting back into work, or has faced challenges with trying to balance work and focusing on their children."

Although Lepper started her practice using accounting products with which she had some familiarity, there were two factors that caused her to

step back and look at other software options. The first was cost. She was using a Software-as-a-Service (SaaS) product, and, "Their pricing model didn't accommodate part-time staff," Lepper explained. "You had to have separate access for every user – it started to get very expensive for the type of practice we had. We were paying our tax software provider for a terminal service license, and paying another company to host our software so we can have a cloud version. It made no sense at all. We were transferring files back and forth – that's nonsense in this day and age," said Lepper. Meanwhile the firm was growing, opening a second office, so the ability to access files in the cloud became imperative.

"The other problem we encountered around payroll services," said Lepper. Payroll was a big part of her practice and Lepper struggled to find a payroll product that satisfied her needs. In particular, she was using so many different products, the staff was getting overwhelmed with continuously having to learn new programs. They tried a few alternative applications but nothing seemed to make sense, in particular paying for multiple programs.

In 2015, the firm decided to switch to CCH Axcess. "It was so much better. I was saving a ton of money. It's cloud software: anywhere I am, I have what I need," said Lepper. With the use of CCH Axcess technology, Lepper is able to allow her staff to work from home if necessary. "If someone has a sick child, they can be home."

The transition to CCH Axcess occurred easily. "There were no hiccups or obstacles," explained Lepper. "When I changed to CCH Axcess, I gave them my data to convert – I procrastinated and they told me my data won't

be back until December. I thought, 'This is going to be a really fun tax season...' but knew I was just going to stay the course. I got the email that said my data was converted, I opened up the tax software, and all my data was in there. And the diagnostics are fantastic. They're actually worth reading, absolutely helpful. I like seeing last year's data on the screen instead of having to go back and forth. I can have multiple returns open at once. The best part is the [IRS Form] 8879 process – I can send that securely off to clients quickly. I feel that process alone is probably what helped us limit our extensions.

"We also use Wolters Kluwer's CCH® ProSystem fx® Scan with Auto-Flow Technology, which imports data right into the tax return. I'm the person who wants every 1099 sale in the return – I don't want the IRS coming back later – so we put every transaction in there. With CCH Axcess, I actually enjoyed tax season. I can process things faster."

Lepper's office environment is accommodating to the staff of parents. "If somebody has to have their child(ren) here, we set them up in the conference room. We have things for them to do so we can keep working," explained Lepper. "We wanted to create a culture in our firm that reflects our belief that people can be great parents and great professionals. We believe that having a supportive family-friendly environment is good for the firm, and that it helps our team do a better job of taking great care of our clients." ■

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Julie Lepper, CPA

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