

Toni Anne Rocker Grows, Manages and Protects her Firm with CCH Axxess™

When Toni Rocker started her own accounting firm in 2009, she knew that she'd have a lot to learn. But she had already made one big decision — she would use the same Wolters Kluwer tax preparation software in her new startup that she'd used at her former employer. She had used CCH® ProSystem fx® Tax for more than 10 years, and she trusted it.

“One of my goals when I started my own practice was that I wanted to use the latest and greatest technology to keep up with the younger generation coming out of college and to keep myself updated with the latest IT,” said Ms. Rocker. So in 2010, she embraced the cloud and transitioned to CCH Axxess for tax preparation and document management.

A More Professional Tax Presentation

CCH Axxess™ Tax delivered the same accuracy that Ms. Rocker had come to expect from CCH ProSystem fx Tax. “It helps me present a tax return to my clients that is accurate and professional. It helps me be a better CPA and make an effective presentation,” she said.

With most tax solutions, software updates are time consuming. With CCH Axxess, software updates are performed automatically in the cloud by Wolters Kluwer. “I just turn on my computer in the morning and it's done,” she said.

Secure Document Storage without Manual Backup

Ms. Rocker stores all prior-year returns and papers digitally in CCH Axxess™ Document. She also keeps two years of paper returns at the office for face-to-face meetings with clients. “Document is an excellent software for me because I don't have to worry about performing a backup on my end. I'm not in charge of that — Wolters Kluwer is,” she said. Having access to both historical documents and current returns in the cloud also empowers her to work from home just as efficiently as at the office.

Overall, Ms. Rocker is pleased with CCH Axxess and credits it for giving her the time she needs to focus on growing, managing and protecting her firm. “I love the program. It's very easy to navigate and very user friendly,” she said. “To me, it's the Cadillac — it's the best of the best.”



Key Data

Name: Toni Anne Rocker, CPA, PLLC
Firm Headquarters: Raleigh, NC
Firm Type: Sole Practitioner
Founded: 2009
Website: ToniRocker.com

Services:

- Individual tax preparation
- Small business tax preparation
- Small business services — bookkeeping, payroll and reporting, bank reconciliations

Challenge

- Take advantage of new technology
- Leverage greater efficiency in tax preparation
- Save time in order to focus on growing the business

Why CCH Axxess

- Well-designed user interface that is easy to navigate and use
- No need to perform data backups or install updates
- Flexible and experienced support team dedicated to exceeding expectations

Results

- Produces professional, accurate tax returns that clients appreciate
- Organizes and stores past client returns and other documents
- Enables Ms. Rocker to work from home as efficiently as in her office

For More Information
CCHGroup.com/Axxess
800-739-9998