

How does a small company like Juravel & Company, LLC successfully compete with larger accounting firms?

Juravel & Company, LLC is a four-person CPA firm based in Alpharetta, Georgia, which has been serving individual and small-to-medium corporate clients for over 20 years. The firm has used Wolters Kluwer tax products since its founding in 1987 and has a solid reputation for providing valuable expertise and exceptional customer service to its loyal customer base. Throughout its history, the company has taken advantage of Wolters Kluwer's technology leadership and integration to gain efficiencies and take care of its clients, offering a level of proficiency and service often found only at large accounting firms.

Helping Small Firms Deliver Big Firm Quality and Customer Service

While Wolters Kluwer is well known at large firms, smaller firms like Juravel & Company, LLC have also invested in state-of-the-art tax and practice management solutions to provide their clients with access to the most up-to-date and comprehensive resources available. To deliver top-notch quality and service, the firm uses CCH® ProSystem fx® Engagement, CCH® ProSystem fx® Tax, CCH® ProSystem fx® Practice and CCH Axxess™ Portal. The firm has closely integrated and tailored all Wolters Kluwer products to its workflow, creating powerful end-to-end capabilities for all individual and business client engagements.

The Hub: Engagement

When beginning work on a new individual or business return, Juravel & Company starts out in CCH ProSystem fx Engagement, which the firm has used since 2002. CCH ProSystem fx Engagement enables the firm to gather, synchronize and store all client information in a central location for easy access. Seamlessly linked to CCH ProSystem fx Tax and CCH Axxess Portal, CCH ProSystem fx Engagement helps Juravel & Company streamline their return preparation process while ensuring highly competent work.

For example, when a new client comes to Juravel & Company, the firm scans their data and creates a designated electronic binder, which serves as the repository for all backup, work, correspondence and billing records. Using dual monitors, the firm runs CCH ProSystem fx Engagement on one screen and CCH ProSystem fx Tax on the other, enabling faster and more accurate data entry.



In addition, Juravel & Company takes advantage of CCH ProSystem fx Engagement's QuickBooks® and Microsoft® Excel® integration, which allows the firm to import data and make the necessary adjustments directly from the client's financial records, saving time and ensuring consistency. In addition, the roll-forward feature in CCH ProSystem fx Engagement saves the firm data-entry time and enables the preparer to compare different years quickly and easily.

Once the client's data is imported or entered in CCH ProSystem fx Engagement, the firm completes client returns in CCH ProSystem fx Tax, which provides the industry's most comprehensive tax preparation and diagnostic solution. CCH ProSystem fx Tax verifies work and tests for omissions and inconsistencies. Juravel & Company then electronically files completed returns for their clients and pushes the work back into CCH ProSystem fx Engagement, where it is immediately placed in the appropriate online Engagement binder. From there, they upload the completed return to CCH Axxess Portal, where clients can access it safely and securely for signatures and approvals. In addition, all billing is automatically pushed through CCH ProSystem fx Practice and the firm uploads all invoices to CCH Axxess Portal as well, accelerating the billing and payment process.

Juravel & Company, LLC Key Data:

- Founded in 1987
- Based in Alpharetta, Georgia
- Four full-time staff members
- Conducts approximately 400 individual and 200 small/medium business returns per year

CCH Access Portal: Providing Safe and Secure Document Access

Of all of the Wolters Kluwer solutions the firm uses, CCH Access Portal is their most recent addition. With concerns over data security at an all-time high, Juravel & Company selected Wolters Kluwer products rather than implement their own complicated data encryption process. CCH Access Portal provides Juravel & Company with a safe and secure online data security system that complies with state laws prohibiting firms from sending confidential information via unencrypted email. As a result, clients have full access to their completed returns and correspondence with the confidence that all of their data is secure.

“CCH Access Portal is a huge step forward in enabling us to more efficiently get documents to our clients quickly and securely,” explained Phil Juravel, founder and owner of Juravel & Company, LLC. “Up until last year, we’d complete a tax return, print out a copy, place it in a binder and have the client come into the office to sign it. With CCH Access Portal, we print their copy to a PDF file that our clients can download at their convenience. There’s no printing of a return and no putting it into a fancy binder. Best of all, their copy is available to them almost immediately once we complete it.”

— Phil Juravel,
Founder and owner of Juravel & Company, LLC

Integrating CCH Access Portal into their practice has made it easier for Juravel & Company to better serve their clients all over the world. Even clients that live outside of the U.S. can easily access their returns through CCH Access Portal. In addition, the firm doesn’t use as much paper and no longer has to purchase and store binders for each client, since all work is now completed and stored electronically.

Wolters Kluwer product training has also helped the firm maximize its investment in technology. “The time we spent in training on CCH Access Portal really helped us plan and implement it with ease,” explained Juravel. “Given the powerful capabilities of each Wolters Kluwer product, proper training is essential to ensure you are getting the most out of each solution as possible.”

A Competitive Investment

Juravel & Company continues to evaluate and invest in technology on an ongoing basis with the goal of serving clients even more efficiently. Clients recognize the high level of quality and service and bring the firm repeat business and referrals.

“As I see it, Wolters Kluwer technology gives us an advantage over competitors our size and enables us to serve clients as well or better than larger firms who have not made the technology investment,” said Juravel. “Working so closely with Wolters Kluwer over the years and tailoring each solution to our environment has saved us a great deal of time and enabled us to deliver the high level of quality and service our clients expect from us.”

Using Wolters Kluwer solutions, the professionals of Juravel & Company:

- Save time and increase accuracy with one-step client data entry
- Provide clients with safe, secure access to completed returns
- Maximize their investment with exceptional training and support
- Serve their clients as well or better than larger firms

For More Information
CCHGroup.com
888-CCH-REPS (888-224-7377)

