

### Summary

#### Company profile

Name: Pitt Martin Accountants & Tax Advisers  
Region: Australia  
Operation: Accounting Firm  
Products: Tax, Accounting, Business Advisory and Self-Managed Super Funds.  
Website: pittmartin.com.au

Established in 2016, Pitt Martin Accountants & Tax Advisers is part of a new breed of innovative technology-oriented accounting firms, looking to transform how they deliver traditional products and services with a new approach. Launching with a goal to provide specialist advice in the cloud from day one, the firm offers general tax and accounting services, together with specialist SMSF accounting for the under-represented Chinese language community in Sydney.

#### Challenge: aligning a star- up firm with an established professional-strength cloud practice management solution

Pitt Martin had no intention of being a start-up accounting firm with expensive IT overheads that would restrict the firm's productivity, efficiency and profitability. In line with its technology-oriented and environmentally friendly paperless office approach, Pitt Martin cloud-based practice management platform to deliver on efficiency and productivity goals.

#### Solution: CCH iFirm builds a system to support compliance needs and exceeding financial goals

The firm selected CCH iFirm and its practice management, client accounting, general ledger, Intranet and tax solutions. This was in line with its goal to streamline administration and practice management from job workflow to invoicing. It entirely replaced an administration headcount but still provided the underlying information the founding partners need to create additional services and revenue streams for the firm.

For Teddy Kosasih, co-founder and partner, Pitt Martin Accountants & Tax Advisers, outlined how CCH iFirm is meeting the efficiency benchmark and cloud-first approach for the firm.

“With CCH iFirm Practice Manager it's like having an extra member on your team. With better workflow, you can more easily prioritise job and capacity planning. We may still be extremely busy but are easily able to remain fully compliant.

Teddy Kosasih, co-founder and partner, Pitt Martin Accountants & Tax Advisers

CCH iFirm is also proving to be a great tool to support the capture and management of both client data and the firm's intellectual property. “The Client Accounting solution means automatic integration of external book keeping solutions – it's highly productive and efficient,” he outlined.

“IP of everything from client engagement, BAS and tax returns to SMSF documentation is captured in one click shaving off an entire week's administration across the practice each

#### Benefits: supporting long term employee responsiveness and adding value to the business

Launching a new firm with the support of CCH iFirm has proven highly successful for Pitt Martin. With enhanced automation and productivity, streamlined workflow and a transparent dashboard and reporting system the firm is on target to exceed its first year's results.

“By implementing CCH iFirm we have met – and doubled – our goals this year. We have the ability to discuss the bigger issues with our clients and this value add is what they want.

#### Key Benefits:

- Delivers an integration single practice management system
- Ensures compliance, risk and advice services all possible
- Significant time savings redirect partners to add value

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