



## Case study

# Paper costs down and productivity up for AG Tax

AG Tax Limited is an independently run firm specialising in executive tax, based in Mincing Lane in central London. Director Andrew Gammon and his team of 11 cover all areas of personal tax compliance and planning, including dual contracts of employment, offshore discretionary trusts and international pension plans.

### Key benefits for AG Tax



Ready access to client information from any location



Confidential data and correspondence are secured



Support is provided by an expert team who understand the business

### Safeguarding the business and its clients

In the course of the firm's work, the AG Tax team generates many documents such as tax returns and working papers running into hundreds of pages. Coupled with correspondence and original tax source documents, this used to create a mountain of paperwork, so much so that the firm started to run out of office space. Using off-site storage increased overheads and introduced lengthy waits for documents to be retrieved.

Practice Manager Helen Wagner says, "We had another major concern: disaster recovery. Reliance on paper makes any business vulnerable to natural disaster, theft or loss."

The answer was CCH Document Management from Wolters Kluwer. Since implementing the software in 2012, the firm has reduced its space consumption. At the same time, being able to store copies of electronic documents in a secure off-site location has strengthened business continuity.

### A new way of working

Helen says that client service has benefited from the software's fast search and retrieval facilities. "The team can see for themselves how much time CCH Document Management saves. We no longer spend ages searching for a document, let alone wait for 24 hours to retrieve boxes from storage, as used to be the case. In the early days, this was a great motivator in encouraging them to use the software systematically. They quickly came to prefer filing documents electronically as they go along, rather than blitzing a huge pile of paper every few days."

Client information is securely available from any location. Helen gives practical examples of the benefits this brings, "At busy times of the year, the time spent commuting into central London can be focused on client work."

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In addition, when visiting clients, staff can pull up the information on a tablet or laptop. Speaking personally, I work from home two days a week and can access the latest versions of documents as if I were in the office.”

CCH Document Management also makes it easier to respond to data requests from clients in a timely way under the General Data Protection Regulation (GDPR).

#### **Honest advice**

As a busy practice manager, Helen values the close working relationship she has formed over the years with Wolters Kluwer. “We’ve known each other a long time and the support is superb. In fact, we’ve come to regard them as colleagues rather than suppliers. The helpdesk answers our calls in plain English, and our account manager gives us honest

advice. It’s not about getting us to buy the next bit of kit. He knows our business very well and will tell us if a product wouldn’t be appropriate for our needs.”

Helen notes that whereas having an external supplier coming on site to work on the firm’s systems could be a source of anxiety, it’s never an issue with Wolters Kluwer, “Our consultant does a really good job and never makes changes for the sake of it. As a result, I can trust him implicitly to set up our systems in the best possible way for us.”

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