



## Case study

# Intellect Business Services supports the nation's foster carers using CCH Personal Tax

Intellect Business Services in Bromsgrove, Worcestershire, offers expert advice and support to UK foster carers, helping them to comply with the special rules on tax and National Insurance and understand their eligibility for benefits and allowances.

### Key benefits for Intellect Business Services



Reliable software that efficiently processes large volumes of personal tax returns



A centralised store of information from which to answer client queries



Support from Wolters Kluwer to gain best value out of the software

### A one-stop shop for foster carers

Getting to grips with their tax obligations and what's available in terms of allowances and benefits can be stressful for foster carers, as Pat Lewis, Tax Department Manager at Intellect Business Services, explains: "You don't know what you don't know and foster carers don't enter the profession to become tax experts. We help them to avoid the hidden pitfalls and gain peace of mind in knowing that all the relevant admin is taken care of."

Intellect Business Services is a preferred supplier to FosterTalk, a not-for-profit provider of independent support for foster carers, who are classed as self-employed, and the first port of call for foster carers on all things financial is a free helpline. Intellect Business Services also offers foster carers a fixed price Self Assessment tax return service.

The firm has been offering this service for the best part of a decade. The team has grown to eight people and CCH Personal Tax from Wolters Kluwer is the foundation of their work. Pat has nothing but praise for the software: "It's always been Wolters Kluwer software right from the start. I've used software products from other leading vendors during my career and I find that Wolters Kluwer software is absolutely bang on. It excels."

### Growing efficiently

Providing a tax return service at a fixed price puts pressure on Pat and her team to keep costs down. "The software is so useful in our work, helping us to process large volumes of returns efficiently. Everyone finds it easy to pick up and use whatever their previous experience."

The number of clients has grown over the years to over 3,000 foster carers - and rising. Pat says, "With Wolters Kluwer software, we can handle more returns with the same team as we keep on growing."

Growth needs careful management, of course, and Pat welcomes the workflow on CCH Central, finding the discipline of using it invaluable in keeping jobs moving along to meet the deadlines.

*"By enabling us to process client tax returns efficiently, CCH Personal Tax software frees us to focus on providing a personalised service to foster carers."*

She says: “With thousands of clients, it could be hard to keep track. Wolters Kluwer set up the workflow to match our business processes and it’s fantastic. What’s more, with everything in one place, client queries can be quickly answered whoever takes the call. We don’t have to go hunting through the paperwork.”

#### **Maximising the value of the software**

Pat is committed to getting the most out of her Wolters Kluwer software. She books regular training days for the team, aware that as long-time users it’s important to keep up to date: “The initial knowledge you start off with when the software is installed becomes lost in the mists of time, and we don’t want to be using a Rolls-Royce like a Mini! Our training consultant is always very patient in answering our questions, helping us to use the software to its full potential to further improve our efficiency.”

Pat appreciates Wolters Kluwer’s listening approach: “Everyone we deal with is always extremely friendly and takes time to understand our business. Our account manager, for example, keeps us up to speed on any new solutions that might be useful in our work, but there is never any pressure or hard sell.”

Pat and her team clearly enjoy their work of supporting UK foster carers, “We feel very privileged to work with these special people, every one of whom has a unique story to tell. By enabling us to process client tax returns efficiently, CCH Personal Tax software frees us to provide a personalised service to foster carers. In turn, this frees our clients to focus on the amazing work they do with the children in their care.”

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#### **Find out how we can help**



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