



CCH ACCOUNTANTS' SUITE
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An Accounting Firm Introduces CCH Portal in the Heart of Tax Season With Great Success

Located in London, Ontario, NPT LLP Chartered Accountants is a thriving 60-employee, 12-partner accounting firm that prepares 4,200 personal tax returns and 1,000 corporate ones per year. Committed to always staying ahead of the curve with respect to technology and convenience, this firm became a largely paperless office in 2008.

In January 2013, the firm decided that it wanted to take the paperless office concept a step further. "Our two tax partners arrived in my office and said that they wanted to go paperless with our T1s, offering our clients electronic delivery of their returns," says Shaun Brown, Manager, Tax at NPT. "Of course, with tax season coming up, this was a tough time of the year to be rolling out an entirely new way of interacting with clients."

"CCH Portal was chosen over all the other products that were available on the market."

Shaun meticulously evaluated all the options that were available on the market, before selecting *CCH Portal* from a company he was quite familiar with. CCH has been supplying his firm with tax-related products for years, including *TaxOffice* Platinum and *Taxprep Forms* as well as *CCH Online*.

"We purchased the *CCH Portal* Tier 1 package, which gave us 2,500 portals and was expandable," comments Shaun. "We did this, because we knew we would eventually roll out our portal to all areas of NPT's business, beyond tax."

Shaun's next task was to ensure that NPT's clients knew about the firm's new portal. Clients were informed in February that with NPT's new portal system in place, they would be able to exchange information with the firm – such as bookkeeping data in a 100% secure environment. And through the portal, they could receive their tax return and their invoices electronically.

So how did the implementation of CCH Portal go?

"*CCH Portal* was remarkably easy to implement," remarks Shaun. "Staff training piggy-backed on the regular training we do to gear up for tax season. "CCH kept up with us, providing support whenever we needed it."



Shaun Brown, CPA, CA
Manager, Tax

NPT's accountants found *CCH Portal* easy to use. Thanks to the product's integration with *Taxprep*, all it took was a few clicks and they were able to conveniently publish a PDF tax return for their clients in the portal without being limited by the size and lack of security of emails and the slow speed of other delivery systems.

NPT's clients eagerly embraced the firm's new portal. Many remarked that they enjoyed the increased security and convenience technology offered and appreciated the

value-added service they were receiving from the firm at no extra charge. "We actually got quite a few positive email responses from our clients," says Shaun. "Some people went as far as thanking us for investing in the new technology."

NPT LLP Chartered Accountants Key Facts

- Founded over 20 years ago
- Thriving firm located in London, Ontario
- 12 partners and 60 employees
- Seven divisions: Wealth Management, Tax, Business Valuations, Healthcare, Audit, Owner-Managed Enterprises and Class Actions
- Prepares 4,200 personal and 1,000 corporate returns each year

CCH Portal Has Helped NPT LLP to:

- Exchange confidential information with clients in a 100% secure environment.
- Reduce courier and paper costs.
- Provide their clients with instant access to their documents.

"Our investment in *CCH Portal* paid out in year one."

NPT is truly capitalizing on all *CCH Portal* has to offer. It has become a more secure, replacement for email, enabling clients to send signed documents back to the firm. Additionally, it has been rolled out, on request, to many corporate clients who are now using it to receive their financial statements, tax returns and reporting letters.

The firm's portal has become a repository for documents that clients can access electronically at any time. For example, when they are in their bank manager's office and require financial statements for a loan.

NPT has set up a portal with the Port Huron firm that does its U.S. tax work, facilitating the secure exchange of information. Similarly, one of NPT's divisions is using the portal to exchange documents with some of its clients on family law matters, while its Wealth Management division is on the threshold of introducing the technology as well.

CCH Portal is even being used during in-person meetings with clients. "Our client boardrooms are equipped with 50-inch flat screens and wireless keyboards," says Shaun. "During discussions, we are able to pull up a client's portal on the big screen and review their documents with them, without ever having to use paper."

Of course, there is one question every accountant wants answered. From a cost standpoint, was the investment by NPT in *CCH Portal* worth it?

"Our introduction of *CCH Portal* kicked off a side project," says Shaun. "We looked at how much money we usually spent on couriers, paper and arrangements we often had to make due to weather delays or last minute rushes. When I compared this to the cost savings we experienced by getting 25% of our T1 clients on-board using *CCH Portal*, it revealed that our investment paid off in year one. Needless to say, this made our partners very happy."

And how does NPT's tax division plan to use its portal in the future?

The firm is hoping to have 50% of its T1 clients using the portal by 2014 and 100% using it two years after that. It ambitiously hopes to eventually make it the primary delivery mechanism for its corporate tax work. And the firm has plans in place for expanding the use of *CCH Portal* as a document repository. "Moving forward, our plan is to have three years of client documents available on the portal for clients to access at any time," says Shaun.

If you are interested in purchasing *CCH Portal* or need more information, call **1-800-268-4522** and speak to a Customer Service representative or visit www.cch.ca/portal

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