

## C&L Tax and Accounting Services, LLP Enhances Competitiveness with CCH Axxess™

Start-up firm delivers personalized client service with large-firm expertise and technology.

### C&L Tax and Accounting Services, LLP Key Data

- Founded in 2009
- Headquartered in Merrick, NY
- Four employees
- Specializing in individual and business tax and accounting services

Suzanne LoBiondo and Christopher Cheeseman worked together at a large national firm for more than a decade before deciding to start their own small firm in 2009. LoBiondo was a tax partner; Cheeseman was a senior manager. It was time for a change.

“As that firm continued to grow, Chris and I wanted something different. Since we both originated in smaller firms, we wanted to go back to that atmosphere and get more involved individually with the clients. So, we bought an existing practice as a base five years ago and have been working to grow it ever since.”

— Suzanne LoBiondo, *Founder and Partner,*  
*C&L Tax and Accounting Services, LLP*

### Small firm experience — large firm expertise

Calling their new firm C&L Tax and Accounting Services, LLP, the partners set out to offer something special — a truly personal, one-on-one client service along with specialized accounting knowledge and experienced professionals normally found only in the largest firms. Their goal was to provide clients with the best of both worlds. The partners intended to utilize software with enhanced capabilities so that their firm’s technology would be able to support clients with complex tax and accounting needs.

“The sole proprietor we bought the firm from was using CCH® ProSystem fx® software. We were happy that he was using sophisticated software, because a lot of small firms do not. We were bringing some high net worth clients from our previous firm that definitely needed higher capability technology.”



### An early adopter of cloud-based CCH Axxess solution

After their first year in business, LoBiondo became aware of CCH Axxess and immediately recognized the benefits of cloud-based software for accounting firms. C&L Tax and Accounting became an early adopter of CCH Axxess™ Tax and CCH Axxess™ Document. The firm already used CCH® ProSystem fx® Scan to scan in client workpapers, and Scan integrates with the firm’s CCH Axxess modules.

“When you are a small firm, your clients kind of expect you to be able to do it all. One of the biggest advantages to CCH Axxess being in the cloud is having everything right at your fingertips. If a client calls with a question, you do not have to go looking for files. From basically anywhere, you can call the client back and be able to look up something for them from their file. I think we are definitely giving better client service with CCH Axxess.”

In addition, LoBiondo joined the CCH Axxess early-adopter team and found the experience rewarding.

“We had regular conference calls with the Wolters Kluwer team to discuss our experiences. We would offer enhancement suggestions, and the team would talk about their ideas to get our opinions. It was really nice to participate in advancing the software. We definitely felt like we had a voice in the process.”

### Paperless office allows more flexible work schedules

LoBiondo and Cheeseman wanted to establish a paperless office as soon as possible, having seen the efficiency benefits firsthand. LoBiondo spearheaded the paperless initiative at the previous firm and thought the ability to work from home would be a big factor in the new firm’s success.

“We came from a paperless environment, so we wanted to get that up and running right away. A paperless office allows people on flexible schedules to work easily from other locations. Plus, part of the reason we started our own firm was to get a better quality of life and be able to spend more time at home.”

## Automated workflows and sophisticated functionality meet any client need

Using CCH Access has fully automated the firm's tax preparation workflow. When clients send in information, an assistant scans it into the system.

“What I like about Scan compared to what I was using at my other firm is that it bookmarks everything for you. It does a really great job.”

Whether scanned from paper or created on the computer, all client documents are saved and organized in CCH Access Document. This includes tax returns, contracts, wills and trust agreements, client receipts and bank statements, and workpapers.

“It's so much easier to find what you need with CCH Access Document. Inevitably, you could not find what you were looking for in a file cabinet.”

Tax returns for business and individual clients are prepared with CCH Access Tax. LoBiondo finds that CCH Access Tax has the capabilities to efficiently prepare returns for any type of client. The overall CCH Access workflow helps C&L Tax and Accounting fulfill their mission of offering large firm expertise with small firm client service.

“CCH Access enables us to handle any type of client. We can offer big firm experience at a smaller firm price, because we came from a big firm. So, we have the expertise to handle more sophisticated work. However, you have to have the right software in place to do that, and CCH Access gives us the technology to help clients with complex needs.”

For More Information  
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