



How does a forward-thinking CPA firm use their paperless environment to streamline workflow, increase productivity, and expand client services?

Grobstein, Horwath & Company LLP uses ProSystem fx® Office

As one of the largest public accounting firms in Southern California, Grobstein, Horwath & Company LLP has provided clients with accounting, tax, and a full range of specialized services, including litigation and management consulting, since 1966. As a Horwath international firm, Grobstein, Horwath & Company LLP belongs to one of the largest global professional services organizations in the world. Today, their international network of business advisors can serve their clients from 400 offices in 90 countries. In order to remain true to their founding philosophy of personalized service, Grobstein, Horwath & Company LLP relies on an advanced, tightly integrated set of tax and accounting tools, part of The ProSystem fx® Office from CCH Tax and Accounting.



CCH Tax and Accounting
A WoltersKluwer Company

SMARTER SOLUTIONS + UNPRECEDENTED

TAKING A GLOBAL VIEW OF CLIENT SERVICE

Grobstein, Horwath & Company LLP has been providing professional services to its clients for over 38 years. The firm now serves a full range of clientele from entrepreneurial businesses to large publicly traded companies.

Grobstein, Horwath & Company LLP has grown to become one of the region's most respected accounting firms by taking a broad view of the services they offer.

THE GROBSTEIN, HORWATH & COMPANY LLP WORKFLOW

To help clients achieve their goals, Grobstein, Horwath & Company LLP goes beyond traditional accounting services, offering clients an integrated suite of services and programs, with a focus on future growth and long-term success. In order to accomplish this, Grobstein, Horwath & Company LLP utilizes the fully integrated technology available in The CCH ProSystem *fx* Office Suite.

Grobstein, Horwath & Company LLP Key Data

- Located in Los Angeles, CA
- 23 Partners
- 120 Full-Time Employees
- Processes the following types of returns annually:
 - 45% Individual
 - 20% Partnership
 - 15% Corporate
 - 15% S Corp
 - 5% Other

CLIENT INTERFACE

Grobstein, Horwath & Company LLP serves clients around the world and by using the powerful and unique workflow tool, ProSystem *fx*[®] Engagement, Grobstein, Horwath & Company LLP staffers can easily synchronize and collaborate while working in multiple locations, and partners can easily review and oversee engagements. Using ProSystem *fx* Engagement, the accounting staff scans client data and supporting documentation into PDF images, then places them into an engagement binder for each client.

While at the client site, Grobstein, Horwath & Company LLP staffers are able focus their time on critical client issues and meetings with senior management instead of sorting through papers and chasing down data.

ACCOUNTING PREPARATION

ProSystem *fx* Engagement stores audit, review, compilation, and tax engagement binders in a Windows[®] Explorer-style file room, allowing users immediate access to critical data, whether working remotely or connected to the firm's network. Microsoft[®] Word and Excel work papers and financial statements can also be incorporated into ProSystem *fx* Engagement binders with links to client, engagement, and trial balance data.

TAX PREPARATION

Similar to more than two-thirds of the top CPA firms in the country, Grobstein, Horwath & Company LLP counts on ProSystem *fx*[®] Tax to provide federal, state, city, and county modules to handle all tax processing requirements. This award-winning technology offers an extensive array of federal and state features, as well as more forms and extensive calculations — including CCH's exclusive *Dynalink/Quiklink* feature that allows for seamless updates to any tax return automatically with any last-minute trial balance changes. Using ProSystem *fx* Tax, Grobstein, Horwath & Company LLP maximizes the firm's time and productivity while optimizing tax compliance engagements for Individual, Partnership, Corporation, Fiduciary, Exempt Organization, Deferred Compensation, and Estate & Gift returns.

In addition, the firm saves valuable time and simplifies asset management tasks by using ProSystem *fx*[®] Fixed Assets. This technology offers a smooth set-up of all tax return information by linking client asset and depreciation details directly with ProSystem *fx* Tax. It also streamlines document management by enabling asset files and PDF versions of tax returns and fixed asset reports to be stored in ProSystem *fx* Engagement binders.

PRACTICE MANAGEMENT

Grobstein, Horwath & Company LLP uses ProSystem *fx*[®] Practice, a powerful practice management technology that allows them to capture more billable hours and account for each employee's time more accurately and efficiently. Using the practice management project-tracking interface, the firm is able to:

- Create and save custom views and share them with other staff members.
- Update multiple fields on multiple projects in one easy step.
- Copy projects to a list of clients based on any firm-defined criteria, including group, partner assignments, or entity.
- Monitor work progression through various stages of completion.
- Select individual projects or groups of projects for rollover.

INTEGRATION = PEAK PERFORMANCE



THE RESULTS: IMPROVED EFFICIENCY WITH A PAPERLESS ENVIRONMENT

By using The ProSystem *fx* Office Suite of products, Grobstein, Horwath & Company LLP has successfully implemented a paperless environment in their accounting and tax practices, saving time and shelf space with a noticeable increase in overall workflow, efficiency, and productivity.

In addition, the firm is using its status as an “early adopter” of technological innovation as a selling point for clients — the firm’s streamlined workflow enables staffers to spend more time advising clients and delivering creative solutions to help reach their individual and business goals.

It has been the firm’s experience that after just **one busy season**, the purchase of ProSystem *fx* Engagement has provided measurable efficiencies and allowed for **better client service**.

PROSYSTEM *fx* OFFICE SUITE OF SOFTWARE AND WORKFLOW TOOLS

Each module in The ProSystem *fx* Office Suite not only functions beautifully on its own, but also facilitates unprecedented integration, streamlining your firm’s operations and enabling your staff to operate at peak performance during critical business cycles.



Grobstein, Horwath & Company LLP currently use the following ProSystem *fx*® products:

- ProSystem *fx*® Tax
- ProSystem *fx*® Engagement
- ProSystem *fx*® Practice
- ProSystem *fx*® Fixed Assets

HOW GROBSTEIN, HORWATH & COMPANY LLP VIEWS THE FUTURE

The firm constantly strives to increase efficiency and effectiveness because they see it as a direct line to enhancing client service and satisfaction. As a client-based organization, Grobstein, Horwath & Company LLP understands that having the right technology is essential to maintaining and growing client relationships.

When you work with CCH Tax & Accounting, you can count on a variety of exceptional support options, including:

A Team of Experts — professionally trained in all areas of tax and technical support, just a toll-free call away.

Tax.CCHGroup.com — instant online access to product and training information, support, and program updates.

Regional Support Team — ensures your smooth transition to ProSystem^{fx} and assists with any training needs.

Effective Training Options — from in-office sessions to community seminars to Web conferencing.

For more information about The ProSystem^{fx} Office Suite of software and workflow tools, call us at 1-800-PFX-9998 or visit us at Tax.CCHGroup.com.



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